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October 1999

TRAINING JOURNAL

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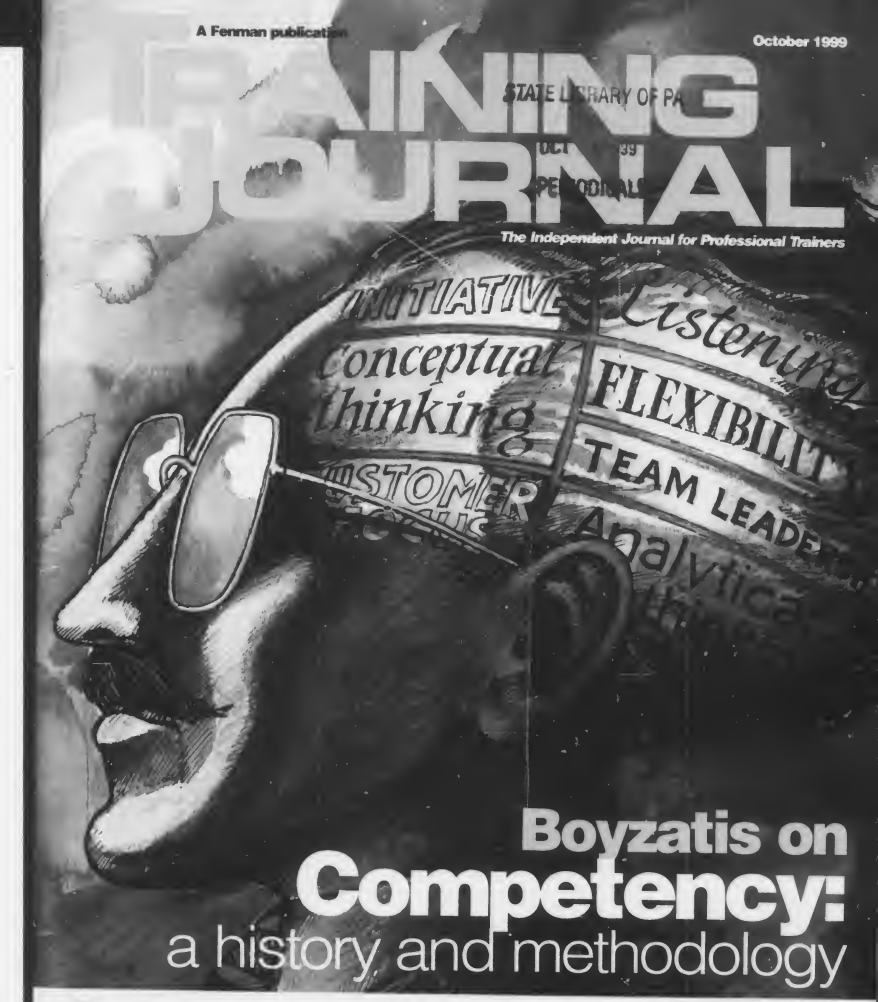
The Independent Journal for Professional Trainers



Boyzatis on Competency: a history and methodology

Training strategy Management training
Communication skills
Sales Training **Negotiation**

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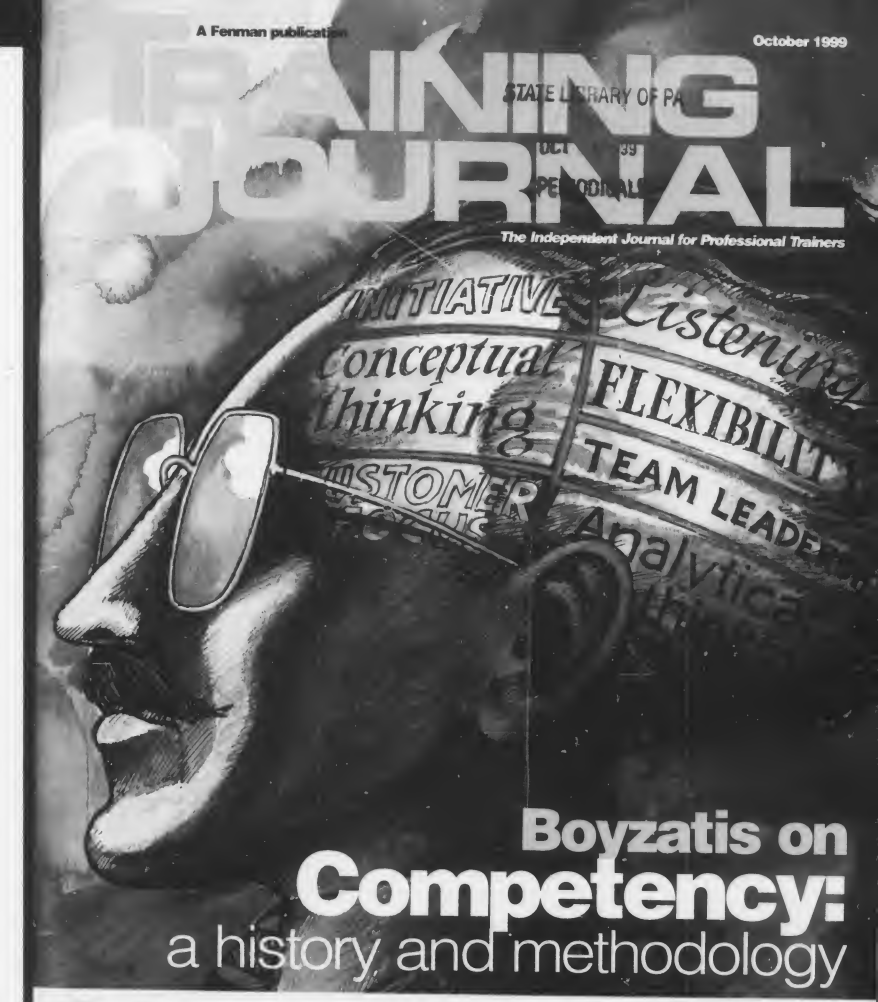

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Training strategy Management training
Communication skills
Sales Training **Negotiation**

Catch the wave

Marketing on the Internet

a new course from Spearhead Training

Profit from this new media

About the Programme

This programme is for Executives who think that the Internet may become part of their promotional mix. Hailed as the great new media, Internet hype has run ahead of reality. However, the potential is there for seriously beneficial marketing activities. Marketers simply cannot ignore the many very large international enterprises that are actively supporting web growth. They may ignore at their peril, the even larger number of enterprises from every sector of business who have a presence and are testing many innovative ideas.

Course Objectives

To brief delegates on current Web progress (using many case studies).
To demonstrate good use of the medium. To provide a forum to discuss technical queries about Web Site Management.
To stimulate ideas within the group which will help with individual organisations' marketing (communication) decisions.

What You Will Gain

Ignoring the web means that many are running the danger of being outflanked by more web aware competitors. This programme is an opportunity to keep up with what is going on and consider opportunities for one's own organisation. Small numbers on Spearhead courses means that there will be time to deal with individual delegate issues. Attending this programme will save months of individual research.

Programme Timings
1 Day Non-Residential
Start 09.45 Finish 17.00

1999 Venue, Dates & Course Fee

LONDON, Business Design Centre - Islington
22 September, 25 October, 17 December
£375 + VAT

Programme Content

The Internet
- ✓ What is the Internet?

Internet Tools and Services
- ✓ Communications
- ✓ Information Browsing
- ✓ E-Mail and Beyond
- ✓ The World Wide Web

Marketing on the Internet
- ✓ A Ultimate Approach
- ✓ Who Is Out There
- ✓ Campaign Management

Marketing Strategy
- ✓ Why Have a Web Site
- ✓ Integration Into Your Organisation

Monitoring Results and Improving Your Strategy

Key Marketing Activities
- ✓ Market Research
- ✓ Direct Marketing on the Internet
- ✓ Selling and Order Taking
- ✓ E-Commerce and Online Payment

An Effective Web Presence
- ✓ What Makes a Well Promoted Web Site?
- ✓ Types of Web Site
- ✓ Web Site Do's and Don'ts
- ✓ Establishing a Web Presence
- ✓ Secrets of the Process

The Future
- ✓ New Technology
- ✓ Opportunities
- ✓ The Future of E Business in the Future

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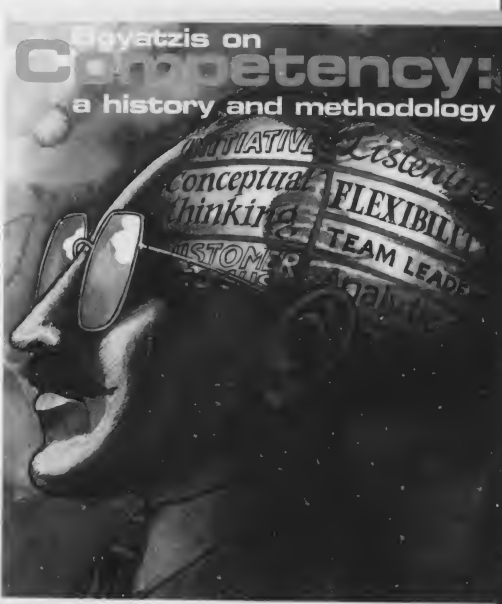

Richard Boyatzis has played a pivotal role in management competencies for more than 30 years. He has studied under, and worked with, some of the foremost academics and practitioners in the field. In this interview with **Martin Delahoussaye**, Boyatzis discusses the history of the competency movement, and outlines his methodology for competency improvement and development . . . **10**

ALSO FEATURED

Business thinking to strategy

How can you align training to the organisation's business strategy? In the first of a two-part article, **Linda Holbeche** highlights the questions to ask and issues to consider in order to clarify your future direction . . . **16**

Learning, learning and performance

In this highly practical article, **Dr Sue Jones** presents her approach to effective people management training using a collaborative workplace method along with work-based training and development . . . **20**

What is selling?

As **Valerie O'Dea** explains, evaluating sales training requires us to clarify what 'sales' means in current business practices so that the content, purpose and outcome of the training is relevant . . . **24**

Fun and games in the training room

As far as **Alisdair Chisholm** is concerned, there's most certainly a place for fun in negotiation training sessions – especially when it's likely to result in a win-win situation for the client, the delegates *and* the trainer . . . **28**

Beyond the fear of rejection

There is only one law of gravity and oxygen has only one chemical structure, yet when it comes to achieving sales success, hundreds of performance-boosting 'systems' are available, each promising to unlock the secret of spectacular production. But men are not from Mars. Women are not from Venus. And 'selling' is not for dummies! **George W Dudley** and **Shannon L Goodson** . . . **30**

What indicates effective communication?

We may well pick up the hidden communication signals that people send to us but are we aware of the underlying signals we give to other people? **Di Kamp** helps us to recognise, and modify in a positive way, those tell-tale signs . . . **34**

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New Media

Brian Tucker reviews

This month **Brian Tucker** gives us his assessment of the European Computer Driving Licence (ECDL 97) . . . **37**

Netcheck

The home page of Coach U(niversity) Inc. comes under **Clare Forrest**'s scrutiny. It's a site, which, according to itself, trains the finest coaches in the world . . . **38**

The 'Oops!' Factor

Do you wince at the 'Oops!' factor? **Anne Marples** does, which is why she offers some common-sense advice for catching mistakes in computer-based training before it's too late . . . **40**

UK-HRD Snippets

Forum members have been discussing communication disasters, and provide us with some interesting and humorous examples of well-intentioned but 'not quite what was meant' communication . . . **41**

Training Resources

What's New...

The latest training resources reviewed by Leslie Rae, Steve Holman and Roger Brown . . . **42**

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Martin Delahoussaye
is the publisher and managing editor of *Training Journal*

Thirty five years young

If the age of a publication has any meaning or relevance, then this month is a landmark in the history of *Training Journal*. Our very first issue was published in October 1964, exactly 35 years ago. Back then we went under the title of *Training Officer* – an obvious choice of name for the official magazine of the newly formed Institute of Training Officers. The formation of the institute and the subsequent creation of the magazine arose from the political will of those who sought to establish an identity for the training profession and the trainers who naturally belonged to it.

Much has occurred over the life of *Training Journal* – methodologies and processes have come and gone, and technology now permeates our working lives in ways that could not be imagined when the Journal took its first tentative steps. The landscape of today certainly reflects a different image to the early 60s but, interestingly, the prevailing climate within the training profession bears remarkable similarities – as the following extracts from the first issue reveal.

'Seldom must the grouping of men (sic) of common interests – outside religion, politics, and trade unionism – into a body with laudable intent have roused such controversy as that which has attended the formation of the British Institution of Training Officers. From the approaches made by so many organisations claiming to represent the Training Officer in one field or other it is clear that it is high time that these varied interests had a focal point and that the Training Officer needs a professional institution in which he (sic) has a sense of belonging' (editorial leader, October, 1964).

'There is not in existence an organisation to which a Training Officer can belong without having another string to his (sic) bow. The other organisations which are now reluctantly claiming an interest in the training field are still prepared to devote only an insignificant part of their business to training, and apparently do not intend the Training Officers in their midst to have much say on this. The institution is seeking to obtain representation on the various official bodies, because I believe that the people who have been responsible for good training in the past are the logical people to assist in giving direction to the training of the future' (opening address by JB Brown, first president of the Institute of Training Officers).

To publish for the same profession for 35 years is a magnificent achievement. This month we acknowledge and celebrate the founders of *Training Journal*, and we also acknowledge those who have given their time, effort and creativity over 35 successful years.

Sincerely,

Martin Delahoussaye
Publisher

TRAINING JOURNAL

Publisher and Managing Editor
Martin Delahoussaye
Telephone: 01353 665779 ext. 235

Editorial Assistant
Jo Button
Telephone: 01353 665779 ext. 218

Production Manager
Michael Stapleton
Telephone: 01353 665779 ext. 219

Advertising
Sue Mennell
Telephone: 01353 665779 ext. 211

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Telephone: 01353 665779 ext. 211

Designer
Zoe French
Telephone: 07803 950433

Illustrator
Mike Edwards
Telephone: 01353 862265

Printer
The Menson Group Ltd
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Training Journal
Clive House
The Business Park
Ely
Cambridgeshire
CB7 4EH

Telephone: 01353 665533
Fax: 01353 663644
Email: trainingjournal@fenman.co.uk
Website: www.trainingjournal.com

Directors
Hugh Murray, BA, FIPD
Michael Herbert, MA, MSc
Catherine de Salvo, BA

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News

Recent events and trends, plus up-to-date news on **government initiatives** and **workplace reforms**

GOVERNMENT

Training is not a sticking plaster

Alan Johnson, MP

At a recent Skills and Enterprise Conference, Chris Hughes, chief executive of the Further Education Development Agency (FEDA) warned business against using training as a sticking plaster. He said that the challenge to employers is to stop seeing training as a remedy for deficits in the workplace. He urged employers to begin work with colleges and training providers strategically, to predict and plan for development.

The conference was hosted by FEDA, the National Training Organisations National Council, and the Department for Trade and Industry. The key note speech was delivered by Alan Johnson MP, Minister for Competitiveness, DTI. He spoke of the dramatic change that has occurred in business – the knowledge revolution – and how the fundamental shift in the nature of our economy demands an equally fundamental shift from government. While acknowledging the shortage of technically skilled people, he also expressed concern over the work that still needs to be done to develop people management and leadership skills. Additionally, the Minister revealed that a new government initiative, 'A great place to work', is under way. This initiative has been designed to spread best practice in enlightened management.

KNOWLEDGE MANAGEMENT

Missing out on know-how

According to a new management report 'Developing a corporate learning strategy', British companies could miss out on one of the biggest business opportunities of the new millennium – exploiting and profiting from their know-how.

The report suggests that more companies need to develop knowledge entrepreneurs and calls for human resource professionals to play a greater role in their development. It argues that organisations need to develop a new approach to corporate learning, and suggests that corporate learning and training could provide sources of revenue in their own right.

Included in the report is an examination of nine key policy issues and 13 case studies from companies such as British Airways, Andersen Consulting, Glaxo Wellcome and the Rover Group.

'Developing a corporate learning strategy' is published by Policy Publications, an independent research and publishing company.

For further information contact (tel) 01234 328448 or (email) policypubs@kbnet.co.uk

ONLINE LEARNING

Business simulations for management development now on-line

A new website lists and describes in detail over three dozen computerised business simulations for management development, including simulations for business appreciation, strategic management, financial management, sales and production management. The simulations are being offered in a customisable form that allows one simulation to be provided in several versions.

The site will also act as an information resource for trainers, training providers and human resource executives. It provides links to professional simulation organisations, describes why organisations should consider using simulations for management development and suggest ways in which they can be used. Additionally, the site owners are making available a number of training activities for free download. Termed 'savouries' (as opposed to cookies!), the first activity is a paper-based financial budgeting exercise. Further savouries are planned.

For further information contact (tel) 020 7537 2982, (email) jeremyhall@simulations.co.uk or visit (website) www.simulations.co.uk

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• OPEN LEARNING

BAOL gives approval to COTU

The British Association for Open Learning (BAOL) has awarded 'Approved Quality Partner' status to COTU, to promote and support the BAOL Quality Mark awards for Learning Centres and Learning Support.

According to BAOL, achieving the 'Learning Centre' Quality Mark will enable organisations to benchmark their Learning Centre against external criteria and demonstrate their commitment to their customers.

Gaining the Learning Centre Mark comprises two stages. In the first of these, COTU consultants will work with client organisations to provide initial support; in the second, independent assessors will carry out external verification. The BAOL Quality Forum monitors this process.

For further information about the Learning Centre Quality Mark Award contact Clare McKenzie of COTU at (tel) 024 7652 6709, (email) cotu@covcollege.ac.uk or visit (website) www.cotu.covcollege.ac.uk

• GOVERNMENT

Adult learning helpline receives 750,000 calls

The Department for Education and Employment recently published a report entitled 'Evaluation of Learning Direct', which shows that over 750,000 callers nationwide have contacted the adult learning helpline since it opened in February.

Learning Direct (0800 100 900) was established last year to provide free advice and information on learning opportunities for adults. It has received enquiries on the availability of courses, careers information, and finance, education or training. Education and Employment Minister Baroness Blackstone says: 'People find it convenient simply to call the helpline and get their queries answered swiftly. Referral may be to FE colleges of the Higher Education sector, professional organisations or distance learning providers.'

According to the report, 57 per cent of callers started a course after contacting the Learning Direct helpline.

• LEADERSHIP

MCI undertakes major new research into leadership

A new research project is being undertaken by the Management Charter Initiative (MCI). Commissioned by the Department for Education and Employment, the project is designed to answer questions such as 'What makes a good leader in Britain today?' and to find out if all managers should be leaders.

It is hoped that the research will be able to add to our understanding of exactly what the positive – and negative – attributes of a leader are, and whether these qualities can be taught in schools as well as in business. It is hoped that researchers, business people and leaders in all disciplines will participate in what MCI describes as a 'ground-breaking' project.

Professor Tom Cannon, MCI's chief executive says: 'Knowledge and deeper understanding of management and leadership will give the UK a knowledge edge.' A conference will be held in February 2000 to disseminate the findings of the project.

For further information contact Debbie Warren at (tel) 0171 872 6930 or (email) debbiewarren_meto@compuserve.com

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Government proposes abolishing Training and Enterprise Councils

A new government White Paper proposes the abolition of Training and Enterprise Councils (TECs), the target-setting body the National Advisory Council for Education and Training Targets (NACETT) and the Further Education Funding Council (FEFC). In the White Paper, 'Learning to succeed', the government proposes the formation of a new body – the National Learning and Skills Council. According to the government, the present set-up needs to be changed to better meet the skills needs of employers, and to reduce duplication and inefficiency in resourcing.

• PUBLIC SERVICE

Public sector shakes off its stuffy image

A register office that opened specially on a Sunday to marry 20 couples on St Valentine's Day, a council that currently holds a record ten Charter Marks and an archiving unit that has blown away the cobwebs, are just three real examples of true modernisers.

These three are among the 54 public sector organisations that have just announced their third successive Charter Mark win, the award for excellence in public service. Praise came as the Cabinet Office released the first phase of 1999 Charter Mark winners – 214 in total. A full list of winners will be announced on 1 February 2000, the day of the Charter Mark awards ceremony.

The Prime Minister says: 'Modernisation of our public services is vital to the future of this country. Charter Mark is playing a major part in taking this forward as part of our Modernising Government agenda. But it is important that others in the public service learn lessons from these beacons of excellence. Constantly raising standards, innovate and give value for money. Only then will we get the public services this country deserves.'

• INVESTORS IN PEOPLE

Daedal Training achieves IiP again

Daedal Training Limited, the Kent-based training provider, has achieved the Investors in People Standard for a second time. Director Brian Dodsworth says: 'Our work is designed to help others achieve their business objectives. Investors in People, by helping us impose internal discipline, has made a real contribution to our own business success. Team working has improved, staff involvement and commitment has increased, and with the acquisition of additional skills, our people are much more flexible and knowledgeable.'

For further information contact Daedal Training Limited at (tel) 0181 467 8220 or visit (website) www.daedal-training.com

• HEALTH AND SAFETY

Free Health and Safety Week action pack

A free newsletter and 'action pack' about the forthcoming Health and Safety Week (25–31 October) is now available from the Health and Safety Executive. The pack includes a health and safety video, booklet and stickers promoting the event. The Week, the fourth of its kind, is designed to encourage people to focus and improve health and safety in the workplace.

For further information contact the Health and Safety Executive at (tel) 0845 270 1100.

• BERLITZ CHALLENGE

The solutions to September's competition

1. While Mexicans are enthusiastic about business, discussions related to work usually cease at mealtime. Unless they choose to keep the business discussion going, it's best to stick to more social discussions at lunch. Work issues at lunch will more likely resurface during coffee and brandy, and not over food.
2. NEVER write anything, especially your name, in red ink. It's very bad luck in Korea. Additionally, cutlery or knives signify the cutting of a relationship and are very bad omens. Not a good gift idea in Korea.
3. Sucking air through the teeth is a Japanese non-verbal sign of disapproval and frustration. Suzuki-san is uncomfortable because by changing your price you seem unreliable. Additionally, remaining silent allows for thought, and the best response to silence is further silence, not a different offer.
4. There is a unique, non-verbal 'head wobble' common in India; although it looks similar to the side-to-side 'No' of the West, in fact it is a sign that your Indian associate is listening attentively to what you have to say. Just keep talking.
5. In China, the agreement usually signals the beginning, not the end, of the negotiation. The contract is seen less as a formal statement of terms and more as an acknowledgement that two parties can depend on each other to be flexible when circumstances require change. Legal documents will not determine action; personal obligations will.
6. Men do NOT enquire about other men's wives, no matter how innocent the intent.
7. In time-conscious Germany, you never arrive late, even a few minutes. Additionally, at work in front of others, senior people are always addressed formally, with honorifics and titles: "Franz" should have been "Herr Doktor Braun".

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The winner is John Newcombe, Technology Management.

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For further information contact the Health and Safety Executive at (tel) 0845 270 1100.

The solutions to September's competition

1. While Mexicans are enthusiastic about business, discussions related to work usually cease at mealtime. Unless they choose to keep the business discussion going, it's best to stick to more social discussions at lunch. Work issues at lunch will more likely resurface during coffee and brandy, and not over food.
2. NEVER write anything, especially your name, in red ink. It's very bad luck in Korea. Additionally, cutlery or knives signify the cutting of a relationship and are very bad omens. Not a good gift idea in Korea.
3. Sucking air through the teeth is a Japanese non-verbal sign of disapproval and frustration. Suzuki-san is uncomfortable because by changing your price you seem unreliable. Additionally, remaining silent allows for thought, and the best response to silence is further silence, not a different offer.
4. There is a unique, non-verbal 'head wobble' common in India; although it looks similar to the side-to-side 'No' of the West, in fact it is a sign that your Indian associate is listening attentively to what you have to say. Just keep talking.
5. In China, the agreement usually signals the beginning, not the end, of the negotiation. The contract is seen less as a formal statement of terms and more as an acknowledgement that two parties can depend on each other to be flexible when circumstances require change. Legal documents will not determine action; personal obligations will.
6. Men do NOT enquire about other men's wives, no matter how innocent the intent.
7. In time-conscious Germany, you never arrive late, even a few minutes. Additionally, at work in front of others, senior people are always addressed formally, with honorifics and titles: "Franz" should have been "Herr Doktor Braun".

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PROVEN TO WORK

Diary dates

Free listings on this page are included at the discretion of the managing editor. However, any company wishing to make a firm booking may do so for a nominal fee of £15 + VAT (total, £17.63) for each entry. Entries are limited to three per company in any one issue. Please send your entry details, with cheque, four weeks prior to publication date. Cheques should be made payable to Fenman Limited and sent to *Training Journal*, Clive House, The Business Park, Ely, Cambridgeshire CB7 4EH.

Date & Venue	Event	Contact
14–17 October Leamington Spa	Mediation Training	Nora Doherty, 20 Gaveston Road, Leamington Spa CV32 6EU Tel/Fax 01926 339744; Email mediation@cwcom.net
20 October Central London	Maximising the Business Benefits of Training One-day conference	The Industrial Society, Customer Centre Tel 0870 400 1000; Fax 0870 400 1099
21 October London	Coaching for Performance	Carole Spiers Associates, Tel 0181 954 1593; Fax 0181 907 9290
25–28 October London	**The 4th International Competency Conference**	**Linkage International Ltd, Tel 0181 977 9277**
27–29 October Harrogate	IPD National Conference & Exhibition	Tel 0181 263 3434; Website www.ipd.co.uk
10 November Coventry	Participation and Trends in Adult Learning	NIACE Conference Office, Tel 0116 204 4223; Fax 0116 254 8368
12 November Midlands	Mind Mapping for Business	Illumine Limited, Tel 01753 719926; Fax 01753 719936
18 November London	**How to Market Training & Consultancy Services**	**Audio Briefings, Freepost Mid 18220, Birmingham B5 7BR Tel 0800 542 5432; Email sales@audiobriefings.com**
25 November London	**'The Fusion Experience' – bringing accelerated learning to life in your business A one-day conference**	**Kaizen Training Ltd, The Stables, Mansion House Farm, Bedmond Road, Abbots Langley, Herts WD5 0QB Tel 01923 262278; Fax 01923 269680; Email partners@stables.datanet.co.uk Website www.kaizen-training.co.uk**
30 November Birmingham	**How to Market Training & Consultancy Services**	**Audio Briefings, Freepost Mid 18220, Birmingham B5 7BR Tel 0800 542 5432; Email sales@audiobriefings.com**
7 December Kensington, London	**Sales Training – latest developments**	**Sales Training Association, 17 Playses Green, Hambridge, Langport, Somerset TA10 0AP Tel/Fax 01460 281600**

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Peter Honey BA (Psych), D Litt, Dip Ed, FIMC, FIPD, is a chartered psychologist and management consultant. He can be contacted at (tel) 01628 633946, (fax) 01628 633262, (email) peterhoney@peterhoney.co.uk or visit (website) www.peterhoney.co.uk

CPD records on the rack

The IPD has recently conducted a very thorough piece of research into Continuing Professional Development. Peter Honey comments on the findings and makes a few suggestions.

In 1998, despite requests that IPD members submit their Continuing Professional Development (CPD) records, research reveals that only 38 per cent did so. Yet 58 per cent of the people surveyed (and there were over 1,000 of them) claimed to keep CPD records. There was a clear trend showing that younger members were more likely to keep records than older members; in the age range 25–29, 94 per cent keep records but this more than halves to 45 per cent for the 50–59 year olds.

Now, if we assume that CPD is 'a good thing' two key questions arise from the IPD report. First, is record keeping essential to CPD or, putting it another way, might it be the case that 100 per cent of people are doing it but only 58 per cent are bothering to keep records? Second, why the resistance to submitting records to a third party, in this case the IPD? It seems odd that 58 per cent claim to keep records but only 38 per cent submit them. What has happened to the missing 20 per cent? Why go to the trouble of keeping records and forgoing a splendid opportunity to demonstrate to your professional body that you have done so?

First things first. Is record keeping an integral part of continuing professional development? I think the answer must be 'No' – but it helps. I know from my own experience that I can, and often do, acquire knowledge and skills that enhance my performance but fail to record them other than in my brain. And this from someone who, over the years, has become addicted to note taking! Learning opportunities are always more likely to happen on an unplanned, spontaneous basis than to be formal and planned. (This is backed up by the IPD's survey where two-thirds said their learning cropped up spontaneously from work activities.) I guess that people who relish the spontaneity of their learning find it an awful drag to keep records about it. I'm reminded of the raving activist on an Outward Bound course, where pauses to write learning logs were mandatory, who spent the required 15 minutes sitting on a handy rock, looking suitably thoughtful but only managed to log: 'What a waste of time this reflection bit is. I'll just have to look as if I'm doing it until the time limit is up.'

Clearly, forcing people (especially activists!) to keep written records of their learning does nothing to guarantee the quality of what is recorded! Yet, whenever I have been pressurised into writing about my learning (and I have strong activist preferences) I have always found it added value. It helps to crystallise my learning in a way that merely thinking about it does not. My experience exactly accords with that of Lee Iacocca who, in his autobiography, wrote: 'The discipline of writing something down is the first step toward making it happen. In conversation you can get away with all kinds of vagueness and nonsense, often without even realising it. But there is something about putting your thoughts on paper that forces you to get down to specifics. That way is harder to deceive yourself or anybody else.'

Predictably 'work pressures' are cited as the main barrier to keeping records of development activities. In other words, people are so busy having spontaneous learning experiences that they have no time to keep any notes and, presumably, no time to share what they've learned with colleagues – let alone with the IPD. Besides the claim that recording activities is too time consuming, the IPD report gives some verbatim quotes from the 42 per cent of people who don't keep records.

> "You know what you've done; why write it down?"
> "I don't see the point of it."
> "The emphasis should be on looking forwards, not backwards."

So, to the final puzzle. Why on earth would a significant percentage of people who have survived these hazards and managed to keep records (let's assume they are being truthful and that written records actually do exist) refuse to submit them to their professional body? Well, we have some quotes that throw light on this.

> "Requests to provide information are an invasion of privacy."
> "My personal development activities are nothing to do with the IPD."
> "If my employer is happy, that's enough!"

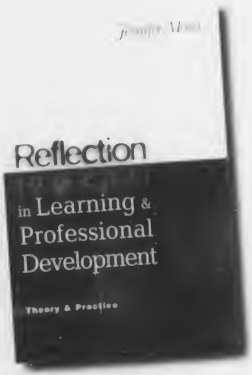
So what is the answer? Well, I can think of a number of actions to get more people into the swing of CPD.

> Adopt a 'force and support' strategy by making CPD a condition of continued membership instead of leaving it as an iffy, discretionary, take-it-or-leave-it activity. At the same time, lean over backwards to acknowledge, recognise, reward and fete anyone who invests effort in making their continuous learning and development explicit.
> Shift the emphasis away from checking, inspecting and assessing, and put it on sharing learning for the benefit of others. Give people choices when it comes to how they share their learning. Those who wish to can put it in writing. Others, for whom writing is a chore, can present it orally (in person or on audio cassette) or do it by taking an active part in a communal learning review.

What we really need, though, is for someone to produce irrefutable evidence that making learning explicit, either in written or spoken words, actually improves the learning. So come on all you budding researchers, there must be a PhD in that!

Books

Reviews of new and recently released titles on **professional development** and **facilitation**.



Reflection in Learning & Professional Development

Jennifer Moon

Kogan Page, 120 Pentonville Road, London N1 9JN
Tel: 0171 278 0433 Website: www.kogan-page.co.uk
ISBN 0 7494 2864 3
Hardback £35.00

For the most part, this is not a 'how-to' title. Indeed, in her Preface, author Dr Jennifer Moon makes it clear that this is 'an attempt to take an overview of reflection'. Given this aim, it is not perhaps surprising that the references run to 11 pages.

The book is structured in three parts. Part 1 is devoted to the literature of reflection, with the author providing an understanding of the theory of reflection and reprising the earlier work of others – including Dewey, Habermas and Schon.

In Part 2 the focus changes to reflection and learning, with the initial chapter affording a timely opportunity to take stock of previous work and thinking on reflection. Thereafter we are treated to 'some fundamentals of learning' (including constructivist philosophy and cognitive structure) before moving on to examine 'mapping' within the learning environment.

The final part, Using reflection to improve learning and practice, considers working with reflection in real-life situations to enhance learning.

> Well researched and cross-referenced, this is a **somewhat challenging read**, even for educational aficionados

Following an informative account of the use of learning journals, the book concludes with a variety of ways and means by which learning through reflection might be secured, including drawing exercises, guided fantasy and repertory grid techniques.

Well researched and cross-referenced, this is a somewhat challenging read, even for educational aficionados. Much of the book comprises blocked text, with little visual stimulation save the occasional model and (most notably) the learning maps.

It would also have benefited from a wider diversity of real-life examples. The majority of those cited relate to the health industry, and would need some translation for other industries and sectors to realise their relevance. That said, I found John's model for structured reflection, itself a health-based example, particularly thought provoking.

In terms of readership, this is an esoteric work written by a specialist for specialists. As such it will appeal primarily to academics, psychologists (including undergraduates, for whom it should become required reading), those working in the field of education and anyone with an interest in Continued Professional Development (CPD). ***RG***

Ratings:		*Clarity*	★★
Innovation	★★★	*Usability*	★★★
Readability	★★	*Value*	★★★

Your reviewers...

Rob Goodwin *FIPD is the principal of SELECT Management Training & Consultancy, and has been actively involved in the field of management training and development since 1983. He can be contacted at (tel) 01234 365593*

Roger Brown *FIPD is the managing director of Xi Associates. He can be contacted at (tel) 01858 463882 or (email) roger.brown@xias.demon.co.uk*

The Complete Facilitator's Handbook

John Heron

Kogan Page. 120 Pentonville Road, London N1 9JN
Tel. 0171 278 0433 Website: www.kogan-page.co.uk
ISBN: 0 7494 2798 1
Paperback £25.00, Hardback £50.00

This paperback is written in a heavy, didactic style. It is full of jargon, yet uses a familiar form of address. As a result, it appears to lack identity, being uncertain whether it is a textbook (of the heavy academic school), a genuine handbook (to which it purports) or an instruction manual (with its use of the familiar).

This comes across very early on in the author's 'guidance for the reader', where describing the structure of the book, he suggests: 'the core model of the book is provided by the six dimensions, interacting with the three modes, of facilitation, together with the account of group dynamics, and the issues involved in creating a facilitator style' (Preface, xii).

The author goes on to suggest that the book may be used as 'a reference manual for facilitators on the job, and as a resource manual for trainers of beginners and of in-service facilitators' (Preface, xii).

Having struggled through the text, I cannot see it achieving this purpose. In his attempts to deconstruct the concepts of facilitation, the author leaves us with far too much text, illustrated by too few (and sadly poor) models and diagrams. He shows little innovative thinking and in the case of his chapter on the experiential learning cycle, actually makes a very straightforward concept difficult to follow.

In summary, this book is complex and confusing leaving the reader bewildered rather than informed, wearied rather than excited. It may just appear on an academic reading list but more for the post-graduate student than the embryonic facilitator or enquiring practitioner! ***RB***

Ratings:		*Clarity*	★
Innovation	★	*Usability*	★
Readability	★	*Value*	★

What's Hot On-line?

Amazon UK's Top 20
Business & Finance Bestsellers

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Boxtree *Paperback*

2 **Customers.com**
Seybold, P
Century/Arrow *Hardback*

3 **Management Challenges for the 21st Century**
Drucker, PF
Butterworth-Heinemann *Hardback*

4 **Trading Online : A Step-By-Step Guide to Cyberprofits**
Patel, AB
Pitman Publishing *Paperback*

5 **Accidental Empires**
Cringely, RX
Penguin Books *Paperback*

6 **Business at the Speed of Thought**
Gates, B
Penguin Books *Hardback*

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Hammer, M, and Champy, J
Nicholas Brealey Publishing Ltd. *Peperback*

8 **Eat the Rich**
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Picador *Paperback*

9 **The Complete Idiot's Guide to Project Management**
Baker, K, and Baker, S
Simon & Schuster *Paperback*

10 **The Balanced Scorecard: Translating Strategy into Action**
Kaplan, RS, and Norton, DP
Harvard Business School Press *Hardback*

11 **The New Marketing Manifesto**
Grant, J
Orion Business *Hardback*

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Harvard Business School Press *Hardback*

13 **The Dance of Change**
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Nicholas Brealey Publishing Ltd *Paperback*

14 **Crossing the Chasm**
Moore, G
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Free Press *Hardback*

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Moore, G
Capstone Publishing Limited *Paperback*

17 **The One Minute Manager**
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Cataudella, J, Greely, D, and Sawyer, B
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Boyatzis on Competencies

Richard Boyatzis has played a pivotal role in management competencies for more than 30 years. He has studied under, and worked with, some of the foremost academics and practitioners in the field. In this interview with **Martin Delahoussaye**, Boyatzis discusses the history of the competency movement and outlines his methodology for competency improvement and development.

MD: *When and how did you first become interested in management competencies?*

RB: It was in 1967. I had worked for six to eight months as an aerospace research engineer and had gone back to MIT to finish my research degree. During that time, I had the observation that while some aspects of the work were intrinsically interesting, the section head, the manager of my unit, and his manager and his manager, were all woefully inadequate at doing anything other than making you feel like a piece of furniture – and not a very good one. I became particularly intrigued with how managers either help or 'unhelp' the people working for them, or with them, to do good work. So I went back to the university and decided to play out the issues of how do people help.

I was still finishing my undergraduate degree in aerospace but I took a management course. Dave Kolb was the instructor; he had just finished his doctorate at Harvard. I studied organisation behaviour and ended up in the course wanting to do a term paper on this issue of helping and he said: 'Well, I've got some data on that, that I haven't analysed yet. It's not exactly on managers and subordinates, it's on peer helping, but none the less it's on helping.'

> 'The healthiest way for the long term is to encourage people to **assess themselves accurately**'

So I said: 'OK, I'll analysis it.' I devoted a lot of extra time to it, more than the usual term paper, and got hired to work for Kolb that summer as a research assistant; we ended up publishing the paper. In the process I also became convinced that I should consider going to graduate school, that should consider a PhD not a master's, and that should do it in psychology not in management.

The next thing I know, I was at Harvard gettin my PhD in psychology, studying with people lik David McClelland and Robert (Freed) Bales.

Throughout my doctoral work I becam absolutely fascinated with the issue of how people change; in fact, I turned down a teaching job at Yale so I could take a position in, what was then, the Behavioral Science Center, which later became McBer and Company.

MD: *What kind of research studies were you involved in at this time?*

RB: Well, for example, in 1970, one of the research studies I was handed was a study being done for the US Navy for supervisory chaplains; that, I would say, was the first comprehensive competency study that we had done at McBer. Prior to this study we had always looked at certain variables like achievement motivation or efficacy and power, but very, very few studies looked at more than two variables. Now, in the 1970's study all of a sudden the question was: 'Why were some Navy supervisory chaplains more effective than others?' So we did in those days what was the only option – we administered a whole battery of tests to try to differentiate one group from the other.

As we got into '71 and '72 we developed opportunities to do some interesting research trying to differentiate more effective from less effective human service workers in New York City – the people that work in the social service agencies and welfare institutes. At the same time as this research was being carried

Richard E Boyatzis is Professor of Organizational Behavior, Chair of the Department of Organizational Behavior and Associate Dean for Executive Education Programs in the Weatherhead School of Management at Case Western Reserve University, Cleveland, USA. His main areas of research are adult development and leadership. Professor Boyatzis has a BS in Aeronautics and Astronautics from MIT and an MA and PhD in Social Psychology from Harvard University. He can be contacted at (email) [illegible]@po.cwru.edu

ncy

a history and methodology

Illustration by Mike Edwards

Boyatzis on Compete

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> 'The healthiest way for the long term is to encourage people to [illegible]'

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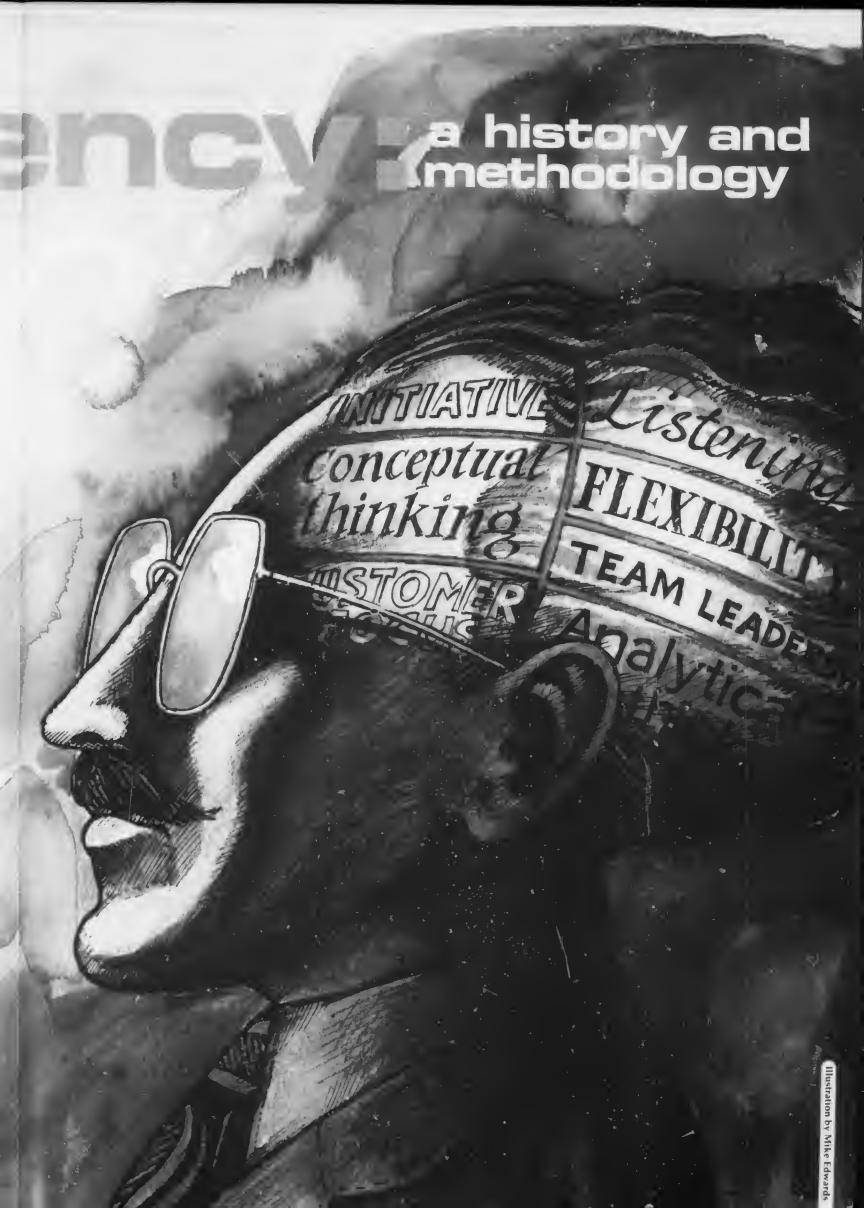

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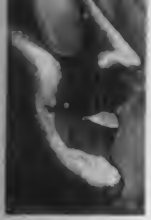

that was developed in the early '50s in the mid '70s, was a whole bunch of different tests, including what later became known as the Behavioural Event Interview, which is really an adaptation of the Critical Incident Interview that Flanagan had first documented in the '50s, although it been around for a lot longer.

MD: *How did you approach assessment and measurement?*

RB: Well, you know in graduate school I'd also studied heavily with Freed who, if you will, is the father of **SYMLOG** and has trained most of the people who wrote many of the key works in small-group theory, outside of the Tavistock tradition. And because he was using audio tape, then later video tape, it got me, and others, interested in using audio and video tape to record exercises.

I began, with some of my colleagues, who were also in the programme at Harvard Psychology, to think about ways to create exercises (that we used to do in workshops or in therapy programmes or whatever), by turning them into assessment activities and then video taping them so that we could code them.

In a sense it was an alternative to what was emerging at the time as the assessment centre technology which, as of 1970, was all based on live raters. By 1973 I had started to develop techniques along with some of my colleagues at McBer, and we'd have Bales, David McClelland and other faculties over to work with us on ways of coding off

'I think it is **wrong to assume** that all the time people spend on courses is relevant to their competency development'

video tapes. The logic goes like this: you can't understand change until you show that people are changing; you can't show that people are changing until you can measure the thing in a way that is both reliable and valid, and you can measure it at multiple times to show that they changed on it. And you can't know what it is that they should be changing on unless you know what makes a difference in outstanding performance.

So we ended up, if you will, seduced into doing a lot of competency studies to figure out what makes for an outstanding performer, not because we were intrinsically interested in that but because we wanted to help people change. The logic is you had to figure that out first, and in discovering that we had to figure it out, we also discovered that to be able to get the measures we had to do some methodological work. That was when

That was a tremendous jump forward for us methodologically, because it enabled us to have reliable and, as we did the studies, valid measures of these characteristics. So what we were doing by the mid '70s was documenting the reliability and validity of the measures. At the same time we were amassing more and more studies of the characteristics that we should be looking for to help people change – which is to say, what are the distinguishing competencies of outstanding managers, sales people, consultants, team resource workers, engineers and so on?

MD: *What were some of the major applications of the research that you and others had undertaken?*

RB: Well, we began to see a focus in terms of training and development, but even more focus, certainly in Europe and the United States, was placed on selection systems, promotion systems, and it almost got training and development put aside. I mean it didn't really, but people weren't looking at it with as much precision – because the operative theory was: 'Look it's going to be cheaper and quicker to get people with the stuff we need, than to develop them.'

By '84 and '85, Lyle Spencer, Dick Mansfield, Murray Dalziel and myself were working at McBer to try to develop a generic competency dictionary that would be comprehensive for all occupations. That work eventually, by early '90s, came out as Lyle and Signe's book *Competence at Work*. I left McBer in 1987, partly because I wanted to return to university; I thought we had pretty much known at that point the characteristics that really distinguished outstanding achieving people especially in leadership management sessions. What I felt the tremendous need to do was to get back to the question: 'Can we help people develop this stuff?'

MD: *As you worked on this, did you eventually formulate a model or arrive at a methodology for developing the distinguishing competencies?*

RB: Yes, and it's a model that says people don't have to go through training programmes; it says what people need to do is to pay attention to their own learning process. I think people have to be at work – as a matter of fact I would never want to teach people unless they were working. And one of the doctoral students has shown that people do much better when they move to another organisation then even when they stay in the same ones. But if they're not working they don't have a chance to experiment, practise and learn from experience.

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hours of helping somebody set themselves on a course that they want, a path. But I would predict that most organisations spend a lot more time than that sending people to training programmes that are ineffective. But if, instead, they used even a small amount of that time and used the right kind of processes, people would find ways to learn more from their existing experiences.

I think it is wrong to assume that all the time people spend on courses is relevant to their competency development. As a matter of fact we have some data that suggests that it's what students were doing outside of classes that was as important, if not more important, to competency development than what was happening in courses. People would be able to change a lot more in the direction that they want using their day-to-day, week-to-week experiences if they followed the right kind of process.

MD: *In Britain, one of the responses to the competency movement was the establishment of the Management Charter Initiative in 1988, a body set up to award nationally recognised competencies. Is it possible that in the desire to define and measure competence in this way, we end up setting too low a standard, and rewarding and recognising ordinary levels of performance?*

RB: Now, that's what I said at the time, when I said I didn't think it was a good idea. Unfortunately my research and quotes from me get used on both sides of the argument. But I've said publicly on various podiums in London and Europe, and other places, that most of the attempts to license or certify people in any field, like the Management Charter Initiative for example, whether it's medical doctors or whomever, always start with good intentions in wanting to establish criteria of excellence and help protect customers. They almost always conclude with establishing mediocrity and excluding people from the process. So personally I think the research is a good idea, but to try to create the common denominator and then impose it as a national standard is overkill. I think it takes it too far.

'I think the research is a good idea, but to try to create the common denominator and then impose it as **a national standard is overkill**'

Personally, I think the healthiest way for the long term is to encourage people to assess themselves accurately. And I think processes should be set in motion whereby people are encouraged to think about their ideals and their dreams and what they really want out of life, and to regularly consider whether or not they are working towards those. At the same time to regularly collect information to say who am I, not just who do I want to be, and how do I come across to others, is the most important process. And if people in organisations did that on a thoughtful and regular basis, people's own self-assessments would be much sounder than they currently are.

MD: *There is debate among trainers and other human resource specialists, as to whether it is possible to accurately measure subjective (soft) skills, such as initiative or influencing. And when these things are measured, it's usually against arbitrary profiles – that is, someone else's view of how to behave – and this can increase the degree of difficulty and accuracy when it comes to measurement.*

RB: Well, we need to be a bit more precise here. It's not that you are comparing hard and soft skills, it's that you are comparing output to skills. But don't refer to them as hard and soft skills because that's not a fair comparison. How do people assess themselves in areas of output that are difficult to measure? I think they have to get data from other people around them as to how they are coming across.

I happen to think that 360 degree is a very useful process. It would be better if it wasn't just questionnaire based – if it was also video-taped and happened as an ongoing process. But, you can't do this if it is tied to performance evaluation – because if I am about to get an increase in salary or not, I'm not going to feel open about what I am frequently doing well and what I am not frequently doing well. I'm going to feel defensive. So I think 360 degree should not be used with performance appraisals or performance management.

But, if I want to figure out how I am acting consistently, I can't just sit around and think about it myself, I have to ask people around me. When we do our assessments we try to get people to collect data, not just from bosses and peers and subordinates, but also from their spouses and from other adult family members. And we also encourage people, in our programmes here, or in the ones I do in industry settings to go to their clients. Because each one of these sources shows you a different side of a person.

Actually, Fred Luthans, in his '88 book *Real Managers* showed something that I found when I was analysing the data for *The Competent Manager* but I never included in the book because I had uneven sample sizes, and that is (and these are my words not his), the competencies that predict success are different from the ones that predict effectiveness.

What he really showed was that the competencies that are seen by bosses as differentiating outstanding performers (you wouldn't be surprised to learn) are things like persuasiveness, oral presentation ability and networking. But what differentiates outstanding performers from the subordinate's point of view are things like coaching and team building – very different sets of abilities. They're related, but they're different. So you have

to get a lot of other perspectives for assessment.

MD: *You carry out a good deal of your work in North America but you have also been a frequent and regular visitor to the UK. So you have had first-hand opportunities to study and observe the cultural differences between us. Do these cultural differences throw up any discernible variances in the distinguishing competencies for success between managers in the States and managers in the UK?*

RB: I think the differences are more evident in terms of values and style than in the demonstrated competencies. Does a person who is an outstanding leader and manager in the UK demonstrate more self-confidence than less-effective counterparts? Yes. Is one behavioural indicator of this being forceful and impressive and unhesitating in settings? Yes. Same as in North America. Is the demonstration of that kind of confidence in public settings socially valued? Not the same. For example, a CEO of a company in the UK is much more likely, if he or she uses humour, to be self-deprecating than in North America. Because we all share the same Anglo Saxon roots, culturally, the differences among us aren't as dramatic as the differences in Latin cultures, Asian cultures, African cultures etc. But, within us the differences are just as dramatic.

Another example, which doesn't have to do with the competency but is a style issue: when people go through university in the UK they are, on the whole, much better trained in the classics and in intellectual argument. And what that means is that having an argument in the UK among managers is different than among managers in the US. In the US you can acclaim the bottom line or the pragmatic utility as the *raison d'être* and it will be sufficient. In the UK, people usually also want to understand why.

There is also a time orientation issue that underlies some of the differences between US and UK managers. The US, historically, is built on the frontier spirit and the entrepreneurial spirit – the thing that drives the country is the economy, and the thing that drives the economy is a continuous wave of entrepreneurially orientated immigrants.

One of the most important things to happen in the US over the past 30 years is the huge influx of Asian immigrants (Vietnamese, Thai, Korean, Chinese) who come from very entrepreneurial cultures – self-driven, self-motivated and so on. And the groups that come to the US from other cultures, like in Eastern Europe, are often the ones who want more opportunity – that is, more entrepreneurial. When you get that kind of an ideology and culture, pragmatism is a philosophy that is dominant – which means that people are willing to change, so adaptability and flexibility, I think, are much more evident in effective US-based managers; they will move things faster because the underlying philosophy of the culture honours quick adaptation.

In the UK, I think your effective entrepreneurs, Branson being a good example, do adapt very quickly and are very flexible. Culturally though, organisational change happens slower in the UK. I don't see that necessarily as bad because a lot of organisational changes are faddish and shouldn't have been done. But on the other hand I think there is a different rhythm to adaptability or flexibility in the US.

> 'When we do our assessments we try to get people to collect data, not just from bosses, peers and subordinates, but also from spouses and other adult family members.'

MD: *Having lived in California for a while I can attest to the different rhythm of adaptability you refer to, but I think the UK business scene is changing.*

RB: Sure, I agree; things have evolved and continue to evolve in the UK. However, if you look where most of the successful hi-tech products and services are being developed, for example, they're coming from places where the people are trained to think fast and think differently.

I was listening recently to Kevin Kelly, one of the founders of *Wired* magazine. He was giving a speech at an executive meeting and he has a new book out called *New Rules for the New Economy*; his argument is we are now beyond the information economy and into the network economy. What that means is, relationships and learning are more important than productivity and maximisation because you don't know what it is you need to be working on and if you don't have the relationships, you can't do enough, fast enough or know enough to do things by yourself.

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strategy

Part one

job-related skills and new working practices.

Making the most of the organisation's human assets requires a more holistic approach to planning for development than relying exclusively on training. However, training is an important activity and one that requires resources – for example, skilled trainers, willing delegates, good facilities and equipment, and financial investment (including opportunity costs). In most organisations these days, there are demands for a return on that investment. Training has to be seen to make a difference to the organisation's success.

If training is really to add value, it needs to take place within a strategic framework. This involves balancing current and future business needs, and providing a service focused on key priorities. If the focus is entirely on current needs, important preparation for future business opportunities may be lost. Many organisations resort to recruiting expensive 'outsiders' because they have failed to grow talent within the organisation.

Similarly, focusing entirely on future needs may mean that the current operation is starved of vital small-scale improvements that can make the difference between satisfied and unhappy customers. At any point in time, the balance of needs may change, which is why developing training strategies as a one-off annual activity may need to be replaced by strategising as a continuous process. This means being able to answer the basic questions that follow.

- *What* are we going to do and *why*? (What strategic purpose are we trying to serve?)
- *Who* is involved? (Who are the stakeholders – including customers, end-users, champions, sponsors, senior managers, shareholders, the community as well as the designers and deliverers of training?)
- *How* are we going to achieve what we are trying to achieve? (What resources such as information, plans and influence will we need in addition to finance and people?)
- *How* will we build flexibility into our plans so that we can respond to needs that emerge?
- *How will we know we've arrived?* (What are our goals? What difference will they make to the business? What targets, with milestones, will we set? What will be our success criteria? How will we measure the 'soft' impact of training? And how will we evaluate the behavioural shifts in relation to the bottom line?)

What to do and why

In this part of the article we will focus on the first of the questions listed above. Determining the 'what' and 'why' involves looking beyond the here and now and using the information available about the organisation's strategy for the next few years.

So often, training and development teams are criticised for creating training strategies that do not match business priorities. Sometimes the problem lies within the HR team itself. If the person who attends board meetings is the HR director and they fail to discuss strategic imperatives with the professionals charged with training and development, it is not surprising that a split occurs.

In the absence of clear strategic direction, how can effective training strategies be developed? Clues about the future needs of the organisation are often evident in mission, vision, values statements or in long-term objectives. It is important to try to work out how the implementation of business plans and objectives will affect the way people will have to work, as well as what they will need in order to be effective in the changing organisation. Some of this information may be available in 'people plans', though these are likely to be reactive and focus on what is current, rather than the key priorities for the future.

If training is to be truly strategic, trainers need to use judgement and intuition to set priorities. Effective strategising relies on good analytical and creative thinking. Interpreting the impact of current trends on employees can provide some pointers to areas that may become problems without training support.

Typically, employees are being required to work more flexibly, use different forms of technology, and work across departmental and organisational boundaries. Managers are required to develop relevant approaches for handling increasingly diverse workgroups, especially when the organisational boundaries are redrawn as in a merger or strategic partnership.

> The best way of creating strategies is to do this in partnership with **key internal clients**

As organisations develop a more international focus, training may be required to develop a cadre of international managers or to help employees work as virtual teams. Any training strategy may need to address some of the employee needs inherent in such changes.

Training strategies need to be flexible enough to address issues that are relevant to both the organisation and the individual. In any training strategy there are likely to be three areas of focus, as follows.

- Organisational level, where corporate requirements such as induction, quality improvement, customer care, leadership, transition management and culture change programmes are addressed.
- Departmental/business unit level, where job-related training and development is likely to take place.
- Individual level, where people are usually motivated to close the gap between their current and aspired capabilities.

Some areas of development, such as the identification of talent and high flyer schemes, span all three levels.

The best way of creating strategies is to do this in partnership with key internal clients. While this is the obvious way to add value in the here and now, trainers may also need to keep a future-focused corporate hat on. This means not only attending to the short-term operational training needs required in any business group but also to the broader, longer-term needs which individual ➤

Linda Holbeche is Director of Research at Roffey Park Management Institute. She also directs an open programme at Roffey Park entitled The Strategic Human Resources Programme. For further information contact Roffey Park at (tel) 01293 851644 or visit (website).
Linda's last book, Motivating People in Lean Organisations, was published in 1997 by Butterworth-Heinemann. Her new publication, Aligning HR and Business Strategy, will be available this autumn.

line managers may be unaware of, or do not see as a priority. Developing effective training strategies that line managers are willing to buy into can require a process of delicate negotiation.

Identifying needs

Before one can prioritise, it is important to put as many pieces of the 'needs' jigsaw together as possible. Individual needs alone can require some trade-offs. One employee, for instance, might require a rapid injection of job-related skills due to changes in technology. Another may have reached a stage in their career where they need a developmental stretch, which a major new responsibility or an MBA programme could provide.

> Training strategies need to be flexible enough to address issues that are **relevant to both** the organisation and the individual

Similarly, at a departmental or organisational level, needs must be identified together with the timeframe for implementation. Not everything will need to be done now but some things may need to be started.

One way of identifying the requirements is to carry out some form of development needs analysis based on the existing workforce. There are many ways of doing this – including surveys, using existing data such as appraisal information, 360 degree feedback data, sampling of specific groups and benchmarking with world-class organisations to identify obvious gaps.

Since development activities, especially job-related skills acquisition, should lead to enhanced performance, managers need to be involved in the process of identifying needs and providing follow-up. The analysis should provide answers to the key questions that follow.

> While strategy-making may appear a logical process, in most cases it is a **highly political undertaking**

- What is needed and why?
- Where is it needed?
- By whom?
- How can this best be provided?
- How much will it cost?
- What will the expected return look like?

While a training strategy should be adaptable to individual needs, organisational priorities may take precedence. This is where having a guiding framework and criteria for decision-making can be helpful. Having a common language for describing development needs and for tracking progress can also be beneficial.

Increasingly, competencies are widely used for this purpose. Some organisations use 360 degree and other forms of feedback based on competencies to ensure that development opportunities are well targeted to meet both business and individual requirements.

One software company, for instance, provides feedback from skilled facilitators followed by a range of optional workshops which managers attend according to the needs identified through the feedback. Competencies are also used to develop self-assessment questionnaires and other tools to ensure that individuals understand their strengths and weaknesses and are better able to play their part in a developmental partnership.

Prioritising training needs is never easy. In the short term, management development effort may produce best effect when applied to specific business objectives and particular groups or individuals. The short-to-medium term business strategy is a good guide here.

If, for example, the current main business priority is maintaining quality standards, it may seem inappropriate to put effort into change management or leadership development. Conversely, if the management team wish to prepare the organisation for ongoing change, these competencies become priorities.

Another way of prioritising is to look at the biggest obstacles, in terms of employee skills and behaviour, to achieving the overall business goals. Does the lack of certain competencies prevent the organisation from maximising opportunities or does it actually cause operating problems? Other priorities may fall out of the specific priorities of different business groups and also what managers themselves would like to develop, as well as cultural needs such as developing a teamworking climate.

The important thing to remember is that while strategy-making may appear a logical process, in most cases it is a highly political undertaking, and requires good intuition and influencing skills from those involved. It could be argued that when some training teams are under constant pressure to prove added value, it may be that they have failed to manage the political part of the process.

In organisations where training takes place against a broad backdrop of a learning culture, training is seen as a useful end in itself. The challenge for training teams is to reach the point where their training strategies visibly result in improved organisational and individual effectiveness – and they can prove it – but are not required to do so. That is the point at which value speaks for itself.

Part two of this feature will be published in the November issue of *Training Journal*.

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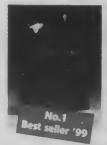

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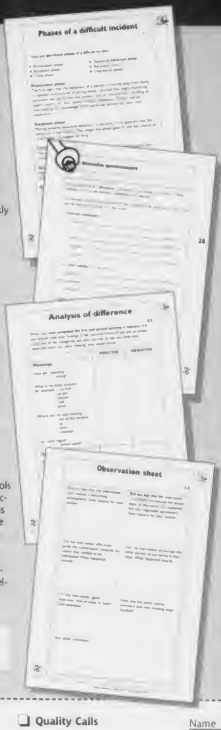

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Leading learning & performance

In this highly practical article, **Dr Sue Jones** presents her approach to effective people management training using a collaborative workplace method along with work-based training and development.

In the 1998 Labour Party conference, Tony Blair claimed that the fundamental problem with business is not to do with interest rates or the value of the pound, but 'too few first-class managers, too little investment and too little productivity'. A report published last autumn by the management consultancy Mckinsey added to the message by highlighting a huge gap in productivity between Britain and other leading industrial nations.

Significantly, Tony Blair put lack of good management first on his list, and this is instrumental in creating low investment and productivity. Much of the evidence points to one particular aspect of management that is lacking and suggests how this should be addressed.

Fact 1

An in-depth study[1] has provided hard evidence to show that people management far outstrips emphasis on quality, technology, competitive strategy or research and development in its influence on the bottom line. The findings showed that investment in employees' skills, and giving them responsibility and autonomy, were key factors relating to improvements in profitability and productivity.

The example of Porsche

In 1989, the German car manufacturer Porsche was in a worse state than Rover was in 1998, clocking up huge losses. A new chairman

subsequently introduced a radical plan for modernisation. What was radical about this plan was not the introduction of new equipment and technology, but the way in which employees were collaboratively involved. They were told they had an important role to play and the company could not improve without their help. Most importantly, the chairman realised that a new system would not work if the decision to adopt it was made by management; it must be a decision made by the workforce. That generally was the way the company followed. Porsche subsequently became highly profitable with a full order book.

Fact 2

Company leaders seldom know how to convert the belief 'Our workers are our most important asset' into a living part of their organisation. For example, the researchers in the previously mentioned study believe it revealed that managers seem to be averse to managing people, and neglected people management on a vast scale.

Fact 3

Training and development in the area of people skills – leadership skills, team skills, customer care and so on – is often wasteful and ineffective in changing workplace behaviour and performance.

The evidence for the central importance of managers 'collaboratively' involving employees for gaining competitive advantage gives a strong case for addressing the reasons for ineffective training provision in this area and how to overcome them.

Ineffective people management training

Consultants and others have been criticised for complicating the latest 'big idea' in management (namely, knowledge management) and for failing to focus sufficiently on practical business issues. The same could be said, I believe, for many of the other 'big ideas' – including TQM, teamworking, leadership development and empowerment. Training and development offered in all these areas has frequently been complex and lacked direct practical relevance and usefulness – factors no doubt contributing to senior management responses such as: 'It'll cost too much', 'It'll be too disruptive', 'It's too involved', 'It'll take up too much time' and 'It's not practical'.

Training courses linked with people management initiatives are often not practical for the following reasons.

- Although presented as practical, they still have mainly a theoretical component delivered by an authoritarian/autocratic (essentially chalk and talk) approach.
- Those courses with a practical component tend to use artificial activities (for example, unstructured group discussion, team exercises and puzzles, outdoor games) which do not directly relate or translate to workplace activities.
- They marginalise the importance of developing core collaborative attitudes and skills.
- They neglect the influence of top/senior management.

Generally, such training fails to change behaviour and performance because it fails to equip people with a structured framework and method they can take back to the workplace, to effectively apply and practice there.

Table 1: A broad framework for work-based training and development

- **Introductory session(s):**
  - give a brief rationale for the value of the practical procedure being introduced
  - give hand-outs of the practical aids and how to use them
  - model the procedure (that is, give an opportunity for people to respond, comment, question, suggest and so on using the practical aids).
- **Practise session(s):**
  - to give people an opportunity to practice in a 'safe' environment (with peer groups of managers/trainers).
- **Work-based development:**
  - use of procedure in workplace (training sessions, team meetings and so on)
  - follow-up sessions at various intervals to receive feedback or to observe and give feedback if requested.

> Company leaders seldom know how to convert the belief 'Our workers are our **most important asset**' into a living part of their organisation

Effective people management training

To deliver effective training in this area it is necessary to undertake the following.

1. Provide a structured 'collaborative' method that:
   - can be assimilated into day-to-day activities in the workplace
   - enables managers to start changing their behaviour and approach by simultaneously developing their core collaborative attitudes and skills.
2. Develop the method in a practical way ideally ➤

Dr Sue Jones *is an author and independent consultant in the area of collaborative training and management. She can be contacted at (tel) 01242 515708 or (email) niane@chelt.ac.uk*

using a work-based approach involving senior management 'leading by example'.

1. A collaborative workplace method: three practical aids

The core team format indicated in Aid 1 is an integrated training management method that has been compiled and adapted from research and best practice in the area of management and training. It represents the core elements of people management, of effectively involving and getting the best out of employees, trainees, customers and suppliers. It is a flexible framework that can be adapted to a wide range of workplace activities including:

- training sessions
- team meetings
- change management
- conflict management
- appraisal meetings.

This team format cannot be applied to a formula. If you are not used to an approach like this you cannot go along to the next training session or team meeting and use it effectively straight away. It is likely that you will encounter one or two pitfalls. For example, one difficulty that people, particularly managers and trainers, often have is being brief at the third step. The traditional tendency is for them to talk at length, and rush in with their own ideas, suggestions and solutions. This greatly demotivates people. Hanging back, asking open questions to elicit other people's views and showing them that you are listening to what they say has a powerful impact on them. It starts to make them feel that their views are being respected and valued, and this has a profound effect on things like self-esteem, motivation and learning.

Generally, training has a **poor track record** when it comes to changing behaviour and performance in the workplace

Aid 1: Core team format – an integrated training management method

- *Ask the group to form a 'circle':* if possible with people sitting at tables.
- *Agree on ground rules for proceeding:* for example, don't all talk at once; listen to and value what others say or they won't value or listen to you; avoid dominance by one or two members; behave courteously; avoid negative disagreement; avoid personal criticism and point scoring.
- *Begin with a brief consideration of the issue to be discussed:* presented by team leader or a group member.
- *Encourage expression of ideas, beliefs, concerns, solutions and so on:* gather as many views and ideas as possible (see Aid 3).
- *Visually record:* if appropriate, appoint someone in the group to write up points (make sure they are legible).
- *Encourage evaluation:* counter side-tracks and irrelevancies; frequently summarise (see Aid 3).
- *Write up group's conclusions and decisions for future action:* agree who should undertake the action.

For most trainers and managers, achieving this approach will not be a quick fix. It will depend on them developing certain core 'collaborative' interpersonal attitudes and skills. For instance, they need to have a respect for, and trust in, the trainee's/employee's views and abilities, and a humility in their own views and abilities, to be able to hang back as suggested above, genuinely ask open questions and listen.

Unfortunately, most of us have traditionally developed an opposing set of 'hierarchical' attitudes and behaviours – such as a disrespect for the views/abilities of others (particularly 'subordinates'), and an arrogance about one's own superior knowledge and abilities... which leads to the hierarchical tendency of talking rather than listening and so on.

The use of Aid 1 enables a manager or trainer to start developing the collaborative attitudes and skills, and therefore to improve in applying the format – in a virtuous circle. The process can be helped by the use of two other simple practical aids (see Aids 2 and 3).

How to use the aids

The three aids given in this article should be used:

- before a meeting (look through them as a guide to action)
- as soon after a meeting as possible (use them to assess one's own behaviour and to plan how one would do things differently next time)
- during a meeting (within manager training, trainer training or team sessions – not technical training sessions – set some time aside at the end of the session for self-team appraisal of how the meeting has gone matched against the aids).

2. Work-based training and development

The most effective way to train in the above collaborative method (as for much other skills training) is to use a work-based approach. A model for this is suggested in Table 1. The success of this framework depends on the commitment of the group involved which, to a large extent, depends on the active commitment of senior management to behaviour and culture change – that is, taking part in the training programme, changing structures to support the change and so on.

Aid 2: Core interpersonal skills checklist

Do I do the following?

- Present a relaxed, non-abrasive manner.
- Make eye contact and look attentive.
- Avoid lecturing.
- Avoid compelling people to follow a particular agenda of ideas.
- Let people's ideas and understanding emerge from their own interests and dialogue.
- Ask open questions to find out people's views.
- Patiently give time for people to respond.
- Listen attentively to answers without thinking about the person's status, how they look, dress and talk, and what point I am going to make next.
- Avoid interrupting and imposing my own views and solutions.
- Indicate that what people say makes me think.
- Avoid insisting all comments be directed to me/the team leader.
- Avoid making personal remarks.
- Avoid making judgements against people's ability.
- Help to draw out people's views and feelings by reflecting (repeating) their response.
- Periodically summarise what has been said to clarify and elicit further response.
- Make sure the main points are recorded visually.
- Encourage openness by tolerating differing and opposing views.
- Ask open questions to:
  - encourage people to appraise their own reasons and assumptions
  - help people stick to the point
  - help people be consistent
  - encourage people to appraise the implications of their own views
  - encourage people to seek, question and value the views of others
  - encourage people to evaluate situations and suggest solutions to problems.
- Inform and fill in where necessary.
- Take criticism constructively without being defensive, contradictory or apologetic.
- Take or delegate action on the basis of decisions reached.

Summary

Generally, training has a poor track record when it comes to changing behaviour and performance in the workplace. This is particularly true for people management change initiatives. The solution requires the formulation of a 'collaborative' practical method that not only develops core attitudes and skills and can effectively be integrated into work-place activities, but also work-based training in that method, ideally led and supported from the top.

Aid 3: List of useful open questions

To elicit views

- What are your views on…?
- Can you tell me something about your experience of…?
- What did you do/how did you feel when…?
- Can you explain what you mean a bit more?
- Are there any more thoughts on that item?

To elicit further views by reflecting and summarising

- As I understand you, you're saying that…
- So am I correct in believing you are saying…?

To elicit underlying reasons and assumptions

- Would you like to say why you think that is so?
- What is your reason for saying that…?
- On what grounds/evidence do you believe that…?

To help people be consistent and keep to the point

- I am not clear. Tell me why you think… is linked with your earlier point.
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- So what do you think would be the outcome of what you're suggesting?
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- Does any one else have a different view on this?
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To encourage appraisal of suggestions and solutions

- Can I sum up your suggestion/solution as follows…?
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To encourage evaluation of outcomes

- How would you describe what happened?
- How do you think you did?
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Use some of the questioning under the above headings to fully evaluate the ideas, beliefs and suggestions brought up.

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Illustration by Mike Edwards

What is selling?

As **Valerie O'Dea** explains, evaluating sales training requires us to clarify what 'sales' means in current business practices so that the content, purpose and outcome of the training is relevant.

As an exchange of goods or services for money, at a profit, sales could be redefined as 'orders', and this remains the primary outcome sought by all businesses. How companies go about creating and gaining orders has changed. Thus, so has the role of the salesperson.

The traditional sales cycle focuses on the end result and numerical measures of results (number of new accounts, growth per territory and so on). This was fine, when a client *could* differentiate a proposal or solution from alternative suppliers – which in today's markets is difficult to achieve. Because the sales cycle fails to identify or respond to issues that are important to the customer, it actually works as a barrier to success.

Historically (and surprisingly in some companies still) the salesperson was called a commercial traveller who, due to market monopolies, did nothing more than take orders and needed little training. Next came the sales representative who was also tasked to collect payment as well as take orders, but when this conflict of purpose affected sales, the tasks then became shared with internal order processing and credit control departments. Then, and still very prevalent, came the account manager who looks after all aspects of a client's interaction with its supplier.

However, these departmentalised, functional activities and their associated deadlines and priorities do not lend themselves to the modern day supplier's quest to attract clients, attain customer loyalty and gain advantage in ever increasingly competitive markets. For a training manager, it may be necessary to produce a business case for a new form of sales training.

Transactional or relationship selling?

The order-taking salesperson or inbound telesales agent needs only to be numerate, professional and articulate to do their job. Persuasion and communication skills are now standard, but perhaps some up- or cross-selling training would assist in increasing the order value. Interpersonal relationship skills are also necessary, especially where frequent and regular contact with the same order giver is involved.

The internal or external salesperson tasked with proactively creating orders needs more help – as indeed does the salesperson working in a difficult or declining market. It is often said that a recession sorts out the order takers from the real salespeople. In either case, viewing the exchange of product or service as a mere transaction (the 'This is what we have; do you want to buy it?' approach) brings with it the belief that pure 'closing skills' – traditional as they have become – are all that are required, and both views are wrong. Sadly, many sales training suppliers perpetuate the problem by still offering off-the-shelf and increasingly notorious 'close that sale!' style courses.

While it is important for a salesperson to be sufficiently assertive and confident to request business at the appropriate time (as opposed to waiting to be offered it), the truly proactive salesperson working in a highly competitive market needs more than the traditional response to this pressure. Business relationship selling – and I don't mean just having good interpersonal and persuasion skills – is what works and should be covered in sales training.

Business relationship skills

Business relationship selling and the sales training that supports it are based on a model that encompasses changes in buyer behaviour and business environments.

Markets are becoming more complex, functional management is frequently being replaced with project teams, technology use is increasing, reliability and quality are now standard offerings, customer choice and power are increasing, the cost of information is falling and more personnel throughout an organisation can influence revenue growth.

A sales person now needs to identify decision makers, their roles, buying influences, recognise the key stages through which any sale will progress, flag competitive threats, and formulate successful sales strategies and best action plans to maximise the chance of securing an order… in addition to managing and profiling key accounts, prospects and quotations. Therefore, the job description for today's salesperson includes being a:

- customer partner
- buyer behaviour expert
- market planner
- resource allocator
- cross-functional co-ordinator
- forecaster
- channel manager
- project manager
- investment adviser
- technical expert
- service auditor.

Business relationship sales training

So when customers seek better products/services, increased price/product performance, better supplier performance, improved ease of supply, improved ease of purchase and wider choice, the response cannot realistically come just from the *sales person or function* but must be

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viewed as a global process, coming from the organisation as a whole. Conventional sales training merely reinforces or increases closing ability which may be superfluous. Attempting to sell more of what cannot be delivered leads to frustration. Business relationship sales training, however, assists the salesperson to:

- increase their broader business skills
- seek, gain and use wisely more authority at the customer interface
- present a business case for necessary reorganisation of a sales territory
- spend less costly time listening to customer voicemail messages
- check progress of orders or payment of invoices
- quote committed and realistic delivery dates
- spend less time on price and delivery quoting, and more on value-added selling
- directly contribute to customer acquisition, loyalty and retention.

Measuring performance and training

Rather than measuring and seeking to improve salesperson performance in relation to revenue or quota, business relationship training allows you to identify the strengths and weaknesses of sales teams in relation to *their ability to execute each* ➤

*For 15 years, **Valerie O'Dea** has provided management consultancy, sales training, sales process evaluation and associated services. Author of the recent MacMillan book Better Business by Phone, she is a faculty course director at the Chartered Institute of Marketing. Valerie can be contacted at (tel) 01252 336114, (fax) 07079 006029 or (email) vodea@mcloneyodeaassociates.co.uk*

stage of the sales process. The sales person now, for example, has to take the initiative to co-ordinate the efforts of the customer service representative answering a call, accounts generating an invoice and the behaviour of the technical support team. This does not mean they abdicate their responsibility to ask for orders when appropriate but focuses their skills on additional and equally important areas.

Long-term training and development plans can then concentrate on 'best practice' and the movement of learning between individuals and teams. While coaching has been a predominant tool, it now takes on a new and powerful role. It is no longer aimed at 'improving' but at the expectation of the customer. Coaching is no longer based on the views and expertise of the sales manager – peer coaching takes on greater validity. Measures broaden to include internal performance, use of sales process, customer perception and evaluation of the relationship process, people and teams.

> Some of the best sales people have emerged from **initially cynical** technical and financial personnel

Sales training for everyone?

To measure a salesperson on their cross-departmental negotiation skills (in addition to their customer-facing order creation abilities) does make training more difficult if the rest of the organisation – via its managers – has not been tasked and taught to be sales orientated.

Training courses are emerging with titles such as 'selling skills for financial managers', 'selling skills for non-sales managers' and 'selling skills for technical support professionals'. To train non-sales people how to create orders or positively affect the sales cycle first requires a large amount of attitude training. Understandably, an individual who was recruited for, and has worked in, administration or accounts who is then asked to sell is bound to say: 'I don't want to. If I wanted to sell, I'd have applied for a sales position!'

Awareness and instruction of sales techniques, the sales process and cycle is often sufficient to remove resistance and unveil hidden sales abilities within non-sales personnel. Some of the best sales people have emerged from initially cynical technical and financial personnel!

Table 1: Aims when performing management responsibility of in-house, on-the-job training

- To assess performance on the job in the light of an existing and agreed job description and known standards.
- To determine strengths and current improvements areas, and secure recognition of these.
- To coach in skills and techniques in which deficiencies have been recognised, and impart other knowledge to the extent that this can be done effectively on the job.
- To foster the attitudes of professionalism – by example, encouragement and instruction.
- To give specific guidance in the process of self-training, which must continue in the absence of the manager/trainer.
- To determine training requirements that may not be fully tackled on the job, assessing and reporting on appropriate means of meeting them.
- To evaluate improvements in performance, the effect and methods of training given.
- To motivate.

Business relationship sales training as a motivator

Training is a powerful and underused management tool in many organisations. It is intangible, takes time and is often the 'first thing to go' when financial or operational pressures loom. Nevertheless, as the old adage challenges: 'If you think training is expensive, try ignorance.'

Business relationship sales training can be conducted in-house (or in the field!) or by an external commercial training supplier. The aims when performing the management responsibility of in-house, on-the-job training are given in Table 1. Having read these aims it will thus become clear that the prime function of the trainer/manager is that of control. Sales training should also give salespeople the tools to answer the questions shown in Table 2.

Use of technology

Some would argue that technology will soon obviate the need for sales people completely – but that's a discussion for another day! Certainly, greater use is being made of laptop computers in the sales call and pre-call preparation to make better use of customer data is an important topic for inclusion in training. Effective database marketing means selling effort can be more scientific, more precise and more cost effective through:

- higher response rates
- improved conversion ratios
- up- and cross-selling opportunities
- increased customer loyalty, retention and customer service
- better segmentation
- identification of habits and trends
- improved cost effectiveness.

Additionally, effective database marketing means that understanding of customers, competitors and the market-place can be improved. It can assist in identifying where our product or service stands in its life cycle and market position. It can also assist the salesperson to answer important questions about the customer. For example, a pre-sales training course TNA might ask the following.

- What can you do to assist your customers to gain more business?
- What are your customers' major markets?
- What are their most important products?
- What are their new products and growth plans?
- What are their problem areas and success factors?
- Who are their main competitors?

Customer base evaluation

Customer base evaluation is something that is often missed in sales training. Most companies have a few major clients producing large amounts of revenue and numerous smaller clients producing small amounts of revenue. It should also follow that the large accounts bring in most of the profit – although that is not always the case.

Poor account management means that vast discounts, premium service and customer-led negotiations often erode profit margins. In managing its customer base the company, through the effective training of its sales personnel, should attempt to do the five things listed below.

1. Identify why smaller accounts spend so little. (Do they only have a small requirement that we fully supply or are they giving the rest of their business to our competitors – and if so, why? What can be done so that the account can be developed?)

2. Identify potential for development. (If the number of smaller accounts is vast and with no potential for development, is it wise for us to introduce a minimum order value or contract with agents and distributors to service the smaller accounts. At what spend level is it unprofitable to send an expensive resource such as a field sales person to visit these accounts? How would the relationship suffer, change or be enhanced *by telephone* – rather than field – sales service?)

3. Ensure the major accounts remain loyal to the company. Defection of a major account is costly!

4. Ensure the time spent maintaining major accounts and developing small accounts is appropriately balanced. Know where time should be spent to develop commercial advantage and potential increases in business.

5. Calculate the amount of new business required to ensure over-reliance is not placed on existing business to produce revenue. All companies loose customers through competitor activity, natural wastage and acquisitions so, over time, these must be replaced. Ensure also that resources are adequate to cope with an intake of new business without diluting quality and service. Attempting to gain new customers when it becomes difficult to look after existing ones to the required standard is like trying to fill a bath without putting the plug in.

Table 2: Questions that salespeople should be able to answe

- What market-places do we aim to/currently serve?
- Who are our customers?
- How will/do we monitor changes in our customers values, beliefs, wants and needs?
- What are our customers' current wants and needs?
- How have we targeted our existing customers?
- What are our strengths and weaknesses?
- What opportunities do we see in the future?
- What threats do we need to monitor?
- How well will/do we serve our customers?
- How well do our competitors serve the market-place?
- How are we different to our competitors?
- How do we get our sales now?
- How well known is the company?
- What are our existing and proposed marketing objectives, strategies and plans?
- What size is our market and what is its future potential?
- How well resourced are we – for example, financially, personnel, information technology?
- How strong is our cashflow and credit control?
- What is our pricing policy?
- How technical is our product/service?
- How is short-term profit viewed in relation to long-term growth?
- How do we reconcile market positioning alongside profit margin?
- What is our direct sales effort when compared alongside our market development effort?
- Are we interested in deeper penetration of existing markets or the development of new markets?
- Is there conflict between profit goals and non-profit-related goals – for example, workforce or social?
- Are we orientated towards growth or stability?
- Are we operating in a riskless or high-risk environment?
- Where is our product currently in its development or life cycle?

As the old adage challenges: 'If you think training is expensive, try **ignorance**'

These principles remind us that most organisations prefer not to 'put all their eggs in one basket'. While long-term relationships, partnerships and consultative selling styles have become the 1990s business practice, over-reliance on one supplier is risky. An evaluation of our customer base is a useful method of ensuring that our sales plans accommodate normal buying behaviour. Many sales personnel have no understanding whatsoever of what part their role plays in achieving the healthy balance of customers.

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- identification of habits and trends
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Additionally, effective database marketing means that understanding of customers, competitors and the market-place can be improved. It can assist in identifying where our product or service stands in its life cycle and market position. It can also assist the salesperson to answer important questions about the customer. For example, a pre-sales training course TNA might ask the following.

Table 1: Aims when performing management responsibility of in-house, on-the-job training

- To assess performance on the job in the light of an existing and agreed job description and known standards.
- To determine strengths and current improvements areas, and secure recognition of these.
- To coach in skills and techniques in which deficiencies have been recognised, and impart other knowledge to the extent that this can be done effectively on the job.
- To foster the attitudes of professionalism – by example, encouragement and instruction.
- To give specific guidance in the process of self-training, which must continue in the absence of the manager/trainer.
- To determine training requirements that may not be fully tackled on the job, assessing and reporting on appropriate means of meeting them.
- To evaluate improvements of performance, the effect and methods of training given.
- To motivate.

- What can you do to assist your customers to gain more business?
- What are your customers' major markets?
- What are their most important products?
- What are their new products and growth plans?
- What are their problem areas and success factors?
- Who are their main competitors?

Customer base evaluation

Customer base evaluation is something that is often missed in sales training. Most companies have a few major clients producing large amounts of revenue and numerous smaller clients producing small amounts of revenue. It should also follow that the large accounts bring in most of the profit – although that is not always the case.

Poor account management means that vast discounts, premium service and customer-led negotiations often erode profit margins. In managing its customer base the company, through the effective training of its sales personnel, should attempt to do the five things listed below.

1. Identity why smaller accounts spend so little. (Do they only have a small requirement that we fully supply or are they giving the rest of their business to our competitors – and if so, why? What can be done so that the account can be developed?)

2. Identity potential for development. (If the number of smaller accounts is vast and with no potential for development, is it wise for us to introduce a minimum order value or contract with agents and distributors to service the smaller accounts. At what spend level is it unprofitable to send an expensive resource such as a field sales person to visit these accounts? How would the relationship suffer, change or be enhanced *by telephone* – rather than field – sales service?)

3. Ensure the major accounts remain loyal to the company. Detection of a major account is costly!

4. Ensure the time spent maintaining major accounts and developing small accounts is appropriately balanced. Know where time should be spent to develop commercial advantage and potential increases in business.

5. Calculate the amount of new business required to ensure over-reliance is not placed on existing business to produce revenue. All companies loose customers through competitor activity, natural wastage and acquisitions so, over time, these must be replaced. Ensure also that resources are adequate to cope with an intake of new business without diluting quality and service. Attempting to gain new customers when it becomes difficult to look after existing ones to the required standard is like trying to fill a bath without putting the plug in.

Table 2: Questions that salespeople should be able to answe

- What market-places do we aim to/currently serve?
- Who are our customers?
- How will/do we monitor changes in our customers values, beliefs, wants and needs?
- What are our customers' current wants and needs?
- How have we targeted our existing customers?
- What are our strengths and weaknesses?
- What opportunities do we see in the future?
- What threats do we need to monitor?
- How well will/do we serve our customers?
- How well do our competitors serve the market-place?
- How are we different to our competitors?
- How do we get our sales now?
- How well known is the company?
- What are our existing and proposed marketing objectives, strategies and plans?
- What size is our market and what is its future potential?
- How well resourced are we – for example, financially, personnel, information technology?
- How strong is our cashflow and credit control?
- What is our pricing policy?
- How technical is our product/service?
- How is short-term profit viewed in relation to long-term growth?
- How do we reconcile market positioning alongside profit margin?
- What is our direct sales effort when compared alongside our market development effort?
- Are we interested in deeper penetration of existing markets or the development of new markets?
- Is there conflict between profit goals and non-profit-related goals – for example, workforce or social?
- Are we orientated towards growth or stability?
- Are we operating in a riskless or high-risk environment?
- Where in our product currently in its development or life cycle?

> As the old adage challenges: 'If you think training is expensive, try **ignorance**'

These principles remind us that most organisations prefer not to 'put all their eggs in one basket'. While long-term relationships, partnerships and consultative selling styles have become the 1990s business practice, over-reliance on one supplier is risky. An evaluation of our customer base is a useful method of ensuring that our sales plans accommodate normal buying behaviour. Many sales personnel have no understanding whatsoever of what part their role plays in achieving the healthy balance of customers.

Fun and games in the training room

As far as **Alisdair Chisholm** is concerned, there's most certainly a place for fun in negotiation training sessions – especially when it's likely to result in a win-win situation for the client, the delegates *and* the trainer.

I have only seen violence twice during the 15 years I have spent in training rooms around the world. The first incident was between a long-estranged, bitter couple whose encounter as delegates on a public course ended in bloodshed and tears, but that's another story. The other incident developed from verbal sparring between delegates from competing car manufacturers in 'friendly competition' to actual physical contest, and contact, mostly pushing and shoving with intent before your hero stepped from behind the video camera, feeling like the Jerry Springer of training, to separate the combatants.

Both incidents happened, perhaps not entirely coincidentally, on Negotiation workshops. The estranged couple went their separate ways, each convinced that they had the high moral ground, whereas the car salespeople kissed and made up, amidst much laughter, and learned something – bruised ego is at the heart of most failed negotiations.

Many years ago a man some of you may recall, who dressed in an absurd white suit, told me a story that changed the way I think about negotiation. Imagine, if you will, the following scenario…

It is that time in your life when you have to buy a yacht. After counting your money again, and doing a bit of research, you see an advertisement for a yacht that seems just right and, at £20,000, it is in your league. You go to see the yacht and, sure enough, it is right on brief. You meet the owner and, with your toughest face and voice, offer him £15,000. Quick as a flash, the owner grabs your hand, shakes it and gleefully shouts: 'Done!'

Despite getting a bargain – £5,000 off the asking price – you may feel you have been ripped off or that there is something wrong with the yacht; you will certainly wonder why the owner didn't stand behind his asking price. The point is that the way we feel about a price is more important than the price itself, and it is hard to feel good about a deal if there is no process, no real communication.

Negotiation courses

It seems most negotiation courses cover, not surprisingly, pretty much the same stuff as above – namely stages of negotiation and negotiation techniques, all designed to deliver win-win deals. As is the way of these things, some trainers cover the ground better than others, but most recognise that since the techniques of negotiation are pretty simple in themselves and in isolation, the real learning happens when delegates put the principles into practice. Having a go, in a non-violent sense, is what makes the difference.

Yet what many courses ignore is reality – and the reality of all business deals is that there is a relationship involved, egos do matter a lot and emotions come to the fore in most negotiations. Win-win deals are born out of emotional content of the conversation, and while it is easy enough to design role-plays that allow for process and techniques to be developed, building in the emotional context can be tough.

All too often a single, course-long case study and role-play is used to try to illustrate all facets of negotiation. A series of different types of role-play and exercises run throughout a course is more successful in creating a learning 'build-up effect' of techniques *and* illustrating that the feel-good factor from both parties about a deal is largely what determines its success.

A good start might be introducing a negotiating

game for delegate teams to play 'off the cuff', without preparation and with conflicting short-term goals. This tends to produce a fairly predictable result: delegates make overly tough demands, and veer from sycophantic and fawning to rude and abusive; they play to win at all costs and to hell with the relationship. The winning party feels smug and strong; the losers feel weakened, unfairly treated and vengeful. This presents the trainer with an ideal platform from which to discuss the negative aspects of ignoring feelings in a negotiation. A good trainer will get delegates to laugh at their own behaviour. Learning and laughter seem to be inextricably linked.

Following this with a 'standard business negotiation role-play', designed with clear long-term aims and a potential for mutual profit, allows delegates to experience more of the process of moving towards a winning deal, recognising stages that lead to progress, listening to each other and resolving issues because there is incentive for both parties to do so. It quickly becomes obvious that good business depends on both parties' perception of the deal, their desire to commit to it and their willingness to work together.

Negotiation techniques

When it comes to actual negotiation techniques, things such as Aim High, The Salami (call me if you want to know this one), The Columbo and The Thunderbird (call me, call me!) can often be highlighted in everyday situations, before conversion to a business setting. Who hasn't negotiated over whose turn it is to do the washing up, what to watch on TV or to see at the cinema, where to go on holiday, which car to buy and the like. All these can be used to show that most people already have an arsenal of techniques and tactics!

Practising technique and tactics in a business context demands not only a well-written case study and resulting role-play, but a tacit code of conduct among the players. In practice this can be handled two ways: either making it overt and establishing rules of engagement before delegates negotiate, or by the trainer playing one of the negotiating roles. The second option is usually more successful and much more fun for all involved, including the trainer.

A behavioural analysis model is useful at senior-level courses to explore how technique and style need to be adapted to different characters, and often serves as a trigger for delegates to discover changes they can easily and successfully make to develop better deals with live clients. Again, the trainer can play different behaviour types in short role-plays with delegates, and have a lot of worthwhile fun.

A sermon on 'fun'

Fun! It's a word I always seem to use whenever talking or writing about training and, for the sake of my client who told me that he 'wasn't paying an awful lot of money so that [participants] could enjoy themselves', along with any highbrow or serious-minded readers, let me explain.

Years ago, as a sales director, I used to spend a large amount of my hard-earned profit sending my salespeople on training courses. In those days most companies didn't train and develop their people – much like these days, I suppose – and it was, and is, an easy way to get an edge on your competition. However, whenever my people returned from a course I would always ask them how it was, the most common answer being: 'All right, I suppose; bit boring in parts.' So, when I entered the training business many full and eclipsed moons ago, I determined to run courses that were not boring, thinking that if delegates had fun they would learn more and be more effective in their work, clients would be happy at the return on their investment, and I would have a good time and be successful – delegates win, clients win, I win. The rest, as they say, has been fun.

> A good trainer will get delegates to laugh at their own behaviour; learning and laughter seem to be **inextricably linked**

Now the 'Fun' sermon is over, back to negotiation training. All trainers cover similar material competently, most courses are 'all right', but taking them up to be 'great' involves working in a learning experience for delegates that allows them not only to practice principles, but also helps them to recognise the importance of emotion in winning negotiations.

If this was a training course, my summary slide (if I was to use such a thing) might look like this.

- Don't encourage fights in the training room, but if it happens get them on video tape!
- Listen to men in absurd white suits; they sometimes tell good stories.
- Develop role-plays that create a build-up of learning; don't try to get all your points across in one big role-play lasting the whole course.
- Explain and illustrate the importance of the feelgood factor in a lasting win-win deal, and create role-plays that highlight this (tell-show-do training style in action).
- Don't just observe and comment on role-plays, play a role.

Then again, this is not a course, so I will leave you, more abruptly, with Have Fun!

Alisdair Chisholm is an acclaimed speaker on motivation, author of a forthcoming book and tape The Fire Within, and managing director of Marcus Bohn Associates, a business skills training company. He always wears black. He can be contacted at (tel) 01702 857222.

Beyond
the fear of
rejection

For more than 25 years we have been scientifically studying high-performing salespeople and their under-performing counterparts. We have examined everything from the influence of personality traits to the latest and greatest sales training fads such as neurolinguistic programming. Some of these approaches are better than others. But most, while promising epochal changes, deliver disappointingly modest results. They do not seem to grasp why many talented, capable, motivated, extensively trained salespeople never earn what they're worth.

The most important sales success factor we have confirmed is elegant in its simplicity, yet statistically has a profound influence on sales results. It lacks the come-hither gloss and glitz of modern psychobabble, but satisfies the need for a reliable indicator that distinguishes very high producers from very low producers. It is a behaviour practised by all successful salespeople. What's more, *not* practising it contributes to more failures in sales than all other factors combined.

What's the secret? Successful salespeople initiate contact with prospective buyers on a consistent basis. The rest can't, won't or simply don't.

Whether it goes by euphemistic titles like 'consulting', 'advising' or 'counselling', selling is still selling. Initiating first contact with prospective buyers is its foundation. That's not to say it's the only important thing. It's not. Personality, aptitude, interests and intelligence all play a role. So do goals, values and product-advocating sales training when used in the proper sequence. But unless and until you propel yourself into the community to find new people to sell to, those assets remain dormant, locked away, powerless to earn you a single penny.

Some people already know this. Take Richard Branson, Frank Bruno and Chris Evans. They're natural self-promoters. They're always 'prospecting', searching for advantages, ready to seize opportunities. But for 80 per cent of all new salespeople and 40 per cent of veteran producers, prospecting does not come easily or naturally. For them, it's emotionally difficult. So they avoid it when they can or put it off as long as possible when they can't. Ironically, they fear calling on their own prospective clients. They suffer from an emotional twitch called Inhibited Social Contact Initiation Syndrome (ISCIS).

ISCIS can affect motivated, talented individuals in any work setting. Tell-tale symptoms include stagnant career progress and financial rewards that fall beneath the level of actual contributions. When it strikes sales professionals, it places artificial limits on prospecting. It's called sales call reluctance. And it costs.

We have learnt that most salespeople suffer from one or more strains of sales call reluctance. We also know that, on average, each call-reluctant salesperson forfeits more than 15 pieces of new business every month to less-hesitant competitors. Lost sales and the income they would have generated represent only part of the toll, however. Each year, many potentially successful salespeople abandon promising sales careers due to the discomfort they associate with calling on prospective customers. They never reach the production levels they could have achieved – or, in the case of

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veterans, they relinquish the success they currently enjoy – because, they say, 'the emotional investment no longer justifies the financial rewards'. Everyone loses.

Sales call reluctance is not a one-dimensional affair. Contrary to pop-psych presumptions, it's not merely 'shyness', 'social anxiety', 'fear of rejection' or 'fear of success'. It has its own signature symptoms, origins, developmental sequence, prognosis and remedial procedures.

At present there are 12 known patterns of call-reluctant behaviour. There may be more. Each places a specific type of prospect or prospecting method emotionally off-limits. Look around. You can see them for yourself ... or in yourself.

Most cases of sales call reluctance are acquired. The good news is that, since they are learned in the first place, most can be unlearned with proper training and modern psychological countermeasures. But not all behaviours respond best to the same treatment. That's why proper diagnosis of ➤

George W Dudley *and* ***Shannon L Goodson*** *are authors of the best-seller* Earning What You're Worth? The Psychology of Sales Call Reluctance *(©1992, 1995, Behavioral Sciences Research Press, Dallas, Texas, USA). For further information on their work, contact Paul Waters at (tel) 01491 873957 or (email) PWASSOCIAT@aol.com*

As and point out, there is only one law of gravity and oxygen has only one chemical structure, yet when it comes to achieving sales success, hundreds of performance-boosting 'systems' are available, each promising to unlock the secret of spectacular production. But men are not from Mars. Women are not from Venus. And selling is not for dummies!

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type is essential. Table 1 shows some of the types found most frequently in UK salespeople. The outlook for correcting most types of sales call reluctance is generally positive. Four basic steps are involved.

The first is to become aware of the problem. Many salespeople struggle for months, even years, with the feeling that something is not quite 'right'. They read all the books, attend all the workshops and buy all the 'sure-tire' success tips they can get. Yet they still can't quite put their finger on what is holding them back. That's because the problem may not be personality deficits, poor time management or low rapport-building skills. It may be sales call reluctance.

The next step is to admit that sales call reluctance may be affecting you. Do you recognise yourself in any of the types described in Table 1? Some salespeople will, but nervously or angrily deny it. Others may acknowledge a resemblance, but insist that it's irrelevant, not costing them a penny. Still others can name a dozen colleagues who clearly have the problem, although they themselves have avoided intection. If you can detect sales call reluctance in yourself and admit that it may be a problem, congratulations. You've done the hard part. You're more than half-way to ending your sales call reluctance.

However, it's not enough simply to name it. Next, it's necessary to assess properly the specific unproductive behaviour patterns affecting your prospecting activity. Our research has influenced the development of several easy-to-use countermeasures for managing prospecting fears. But it's essential to match the 'cure' to the 'disease'. Properly accredited training and development specialists have access to a diagnostic questionnaire – the only one of its kind in the world – designed to detect and measure all 12 types of sales call reluctance.

Finally, once you've identified specific emotional barriers, you've got to apply the proper techniques to help bring them down. In all likelihood you didn't acquire sales call reluctance overnight. It may not give up without a fight. Ironically, after years of research and development, a new generation of legitimate training interventions for preventing and correcting sales call reluctance is making a difference in the UK. Yet many salespeople, and some entire sales organisations, continue to believe that a certain amount of sales call reluctance is inevitable. They explain away the problem as some kind of character flaw, or worse, presume that 'fear of rejection' is an inherent, unavoidable part of the sales career.

But research tells a different story. In a recent study, two groups of insurance salespeople were monitored for performance. One group were assessed for the presence of sales call reluctance and taught appropriate techniques for managing it. The other group were not exposed to anti-call reluctance training. During the monitoring period, the salespeople who had learned to overcome prospecting discomfort outsold the others by more than 20 per cent. The difference wasn't the amount of skill or experience, empathy or dominance they brought to their job. It wasn't how much they believed in their product. The secret to their success wasn't a secret at all. It was simply a new willingness to contact more people, more often, than their peers that produced results.

Over-preparer: Hesitation to prospect due to fear of appearing shallow or superficial. Over-preparers continually organise and analyse at the expense of prospecting. They tend to be encyclopaedias of product information – with no one to present it to.

Hyper-pro: Over-concern with maintaining and presenting a professional image. Hyper-pros may confuse packaging with prospecting. They tend single-mindedly to pursue large, prestigious accounts while ignoring the 'smaller fish' that actually pay the bills.

Role rejection: Unresolved, unexpressed feelings of guilt and shame associated with being in sales. Role-rejecting salespeople secretly believe they are a disappointment to others. They think they should be somewhere else, doing something else, and frequently compensate by acting artificially positive.

Yielder: Discomfort with initiating contact due to fear of being perceived as rude, pushy or intrusive. Yielders habitually wait for 'just the right time' to make calls. They may over-emphasise relationship-building skills, at the expense of closed sales, and chronically lack new clients to build relationships with.

Telephobia: Fear of the telephone as a tool for contacting prospective clients. Telephobics may go out of their way to set up face-to-face appointments or may rely on alternative prospecting methods, such as direct mail, when making telephone calls would be more effective.

Oppositional reflex: Emotionally unable to allow anyone to manage, coach, advise or train. Oppositionals' knee-jerk need to be right and know more than others interferes with the ability to learn from the guidance and experience of others.

Average call reluctance scale scores[1]
on six of 12 reluctance types for two UK samples

Call reluctance type	Pre-1997 data[2]	Data since 1997[3]
	34	39
	39	40
	51	44
	27	32
	26	38
	38	36
	10	9.5

References:
1: Scale values range from 0–100 (the lower the better)
2: 271 UK salespeople
3: 240 UK salespeople
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Table 1: Types found most frequently in UK salespeople

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We may well pick up the hidden signals that people send to us but are we aware of the underlying signals we give to other people? **Di Kamp** helps us to recognise, and modify in a positive way, those tell-tale signs.

What underlies effective communication?

When staff surveys are conducted, communication is consistently cited as an area where companies need to improve. Sometimes this is interpreted as a need for better communication systems, and sometimes as a need for training for managers in communication skills. Improving the systems can move a company from awful to slightly better, but effective communication depends on the human touch, and the best, most open systems in the world will only work if the humans involved are inspiring and motivating.

Traditionally, communication skills concentrated on the mechanisms of communicating effectively: do your preparation, have simple, impactful messages, look and sound confident, use visuals – you know the score. Gradually, though, there is recognition that this is not enough – in fact, it is not the crucial piece. The enthusiasm and genuineness of the communicator is what impacts most. Does this mean that some can do it and some can't? Not according to Daniel Goleman and Robert Cooper. These researchers on Emotional Intelligence have identified elements that bring success, and also believe they can be learned.

So where does this leave us? I believe that we need to pay more attention to the safer side of communication. It is suggested that a large part of our communication to others is through our body language and voice tone rather than through the content of our words. So we need to help people become more aware of the general message they are giving to others about their underlying attitude, and to ensure that it is the message they want to give, before we concentrate on specific mechanical techniques.

What is your underlying message?

An underlying message may be communicated by you because of the following three factors.

Your personal state of mind

The first message people receive is how you are in general. We have all experienced a sense of 'keep out of so-and-so's way this morning; they're in a bad mood'. What we often don't realise is that others may be getting that message from us. So we need to be aware that if we're *not* in a good mood, we won't communicate a positive message, no matter what we say.

Your attitude to your subject

If you don't really believe in your own message, that will come through. We can all spot the politicians who are flannelling and obviously don't care about their topic, but who are talking about it for political motivations. What we need to remember is that our own commitment to our topic is equally transparent, and most people have a built-in bullshit detector.

Your attitude to those you're communicating with

The level of respect you have for those you're addressing affects how they receive your message. Think of school: those teachers who believed you were capable of learning their subject and respected you as a human being were far more effective in getting through to you than those who treated you as stupid or clearly disliked you, and you knew the difference. Similarly when communicating with our teachers, we were far more effective with those who we felt respected us than with those who we were scared of or put down by.

What can training do about this?

It's a wonder that any of us communicate effectively at all! What is more, these areas that affect successful communication are all based in attitudes and beliefs that have traditionally been regarded as areas not within the remit of training. Training has concentrated on behavioural and

technical skills areas, because these are areas in which you can measure the difference and therefore evaluate the effectiveness of the training.

Training to change attitudes

There are several ways in which we *can* help people to change their underlying messages. It just requires a different approach to the traditional mechanical skills training.

Awareness

Although most people are conscious that they react differently to different people's communication, they often don't realise why, and they certainly don't usually then recognise that they themselves vary in their effectiveness in communicating for the same reasons.

We can get them to become conscious of this by asking them to talk with each other about good and bad communicators they have known and identify these differentiating factors. Then we can ask them to apply these differentiating factors to their own communication.

When have they been successful and effective, and which factors applied? And what has stopped them being effective?

Their own best practice

Once people are aware that their mood, their attitude to the topic, and their attitude to those they're communicating with all affect how well they communicate, they often feel powerless to do anything about it. After all, we consider these aspects of ourselves to be governed by external circumstances and forget that we are in control of our reactions, they are not in control of us.

It is important, therefore, to remind people that they *have* communicated well, and could be able to do so whenever they wanted to.

I usually ask people to tell each other 'good stories' of times when they knew they got their message across effectively. It doesn't matter if these are work-related or personal. What does matter is that they remind themselves of their own best practice. The stories also help people to recreate the state they were in when they communicated well, because they automatically adopt the body language and voice tone they had in the first instance.

Once we have done this, it is possible to identify some of the factors that make a difference, which gives them more information about their own best communication, as well as confirming the factors identified earlier. Among the most common factors are:

- certainty that the person(s) will appreciate the message
- relaxed body posture
- enthusiasm.

Producing factors that make a difference

There are a lot of ways we can help people to improve their communication by consciously transferring some of the factors that make a positive difference into their hitherto less successful communication. These are creating the right mood, attitude to topic and to those with whom they communicate, message appreciation, body posture and enthusiasm.

● Creating the right mood

I remind people that we are capable of making ourselves feel better by 'treating' ourselves a little. A decent cup of coffee, a walk in the fresh air or wearing clothes that we enjoy wearing can all make us feel more positive. They will come up with lots of ideas that work for them.

● Their attitude to the topic

People often say it's easy to be committed about a holiday, but not so easy to be committed about a work issue that they have to communicate. In this case, they need to think like a journalist: what angle will give them that commitment? It may be, for example, that the results will make work life easier or produce bonuses, or that it will lead to new opportunities. Even if it is a policy they don't really agree with wholeheartedly, it is possible to find an angle such as, 'it's inevitable, and we need to find ways of making the best of it'.

I usually suggest they take an uninspiring topic they've had to communicate and share it in small groups – everyone coming up with possible 'angles' on it.

● Their attitude to those with whom they communicate

People usually set up their expectations of a situation they're about to engage in through their thoughts about it beforehand, such as: 'I'm going to enjoy this', 'this person is always awkward' and 'meetings are boring'. These are self-fulfilling prophecies – we nearly always get what we expect!

There is actually a logical explanation for this. Our thoughts about a situation prepare our bodies to deal with what we are expecting, so our non-verbal message tells people what we think their reaction will be, and most of the time, they conform to our expectation.

It seems sensible, therefore, to practise having more useful thoughts beforehand. I ask groups to list some useful thoughts for interactions with others, so they develop a repertoire of possibilities. They can draw on their own useful thoughts from times when they communicated effectively for this. ➤

Di Kamp is chief executive of Meta, a performance improvement consultancy which specialises in bringing out the best in people at work. She is also the author of several books, including The 21st Century Manager, published by Kogan Page. Di can be contacted at (tel) 01886 880716 or (email) di@meta-positive.com

● Certainty that the person(s) will appreciate the message

In most communication situations, we do know something about the person(s) with whom we are communicating, but we often fail to use that information to help us get the message across. I suggested earlier that we need to find the 'angle' that will help us to be genuinely committed to our topic. We also need to find the 'angle' that will make sense of the message to our audience. This is easy with those who are 'on our wavelength' – it it enthuses us, it is likely to enthuse them. But what about those who view things differently? We often forget to 'sell' the message to them in their terms. For example, if you want to introduce a new training programme at work, you may start by being convinced that it will be an effective way to enhance the performance of managers with their people. You will need to convince managers that this time out from doing their jobs will be worthwhile, and maybe even that people skills matter! On the other hand, you may need to convince the budget-holder that it will be cost-effective and contribute to the business objectives for the year.

The way you present the information to gain the effect you want will need to vary according to your audience. Again, I suggest that small groups take a typical topic to be communicated, and look at it from the point of view of their audience: what will convince them, catch their attention, appeal to them?

A step on from this is to consider the personal qualities as well, such as whether the person has a sense of humour, is always pushed for time, likes visuals, likes notes, prefers a formal or informal approach. In all of this, the communicator is taking notice of the 'world' of their audience, and we all respond more positively when someone has bothered to come on to our wavelength.

So far, all these points have been about preparing to communicate. Normally, we think of preparation as being to do with gathering and formulating our information. Those who communicate well regard the self-preparation as being equally important. It doesn't take a long time, but it does make a significant difference. As they are about to start communicating, they can switch on the final touches to help them to communicate well.

● Relaxed body posture

Most people notice that when they communicate well, they are relaxed and comfortable in their body posture. Just as athletes sets themselves up in the correct body posture to race well, we can arrange our body posture consciously to improve our performance.

I suggest to people that just before they start, they deliberately relax their shoulder and leg muscles and unclench their jaws. A deep breath can also help. This requires some practice because we are not used to the idea of consciously controlling our body posture – we usually let it follow our mood. However, if we set up our body posture, our mood usually follows suit – the two are intimately linked in both directions!

● Enthusiasm

To switch on their enthusiasm, people only need briefly to remind themselves of their 'angles' on the message, and run through their useful thoughts. Again, this takes seconds before they start.

The final touch

So far, the emphasis has been on how someone presents their message. However, an excellent communicator also notices the messages of others. They notice what matters to the other person, they notice if their message is not getting through and they notice what is having an impact.

When the preparation has been done, then you can relax about what you have to say and pay attention to how it is getting through to your audience. I like to remind people that when they are the audience, they would prefer the person to communicate well to them, and they will help them to do so if required. Similarly, people in their audience want them to succeed and will ask questions or give signals to help them.

Responding to your audience is a sign of a good communicator, not of failure. Waking people up to all the signals that audiences give is a vital part of the process of enabling them to communicate well.

I usually ask people to practise paying attention to others, to remind them of all the information that others give off non-verbally and to practise communicating with a sympathetic audience comprised of other members of the group. The sign that it is working is when there is laughter in the room, instead of tension!

In Summary

I believe that everyone is potentially a good communicator, but they have been taught that it is a set of skills that some people have naturally. People get hooked on the idea that it is about presenting properly and having a level of confidence which many feel they will never have. Even those who are confident know they often fail to get their message across successfully and generally have no idea why, so blame it on the poor responsiveness of their audience.

By enabling people to recognise their own part in the process and how powerfully their attitude affects their communication, we give them a head start to improving their performance, and can then build on that with techniques and skills development.

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Brian Tucker reviews

This month, **Brian Tucker** gives his assessment of the European Computer Driving Licence (ECDL 97).

Brian Tucker
is company secretary and co-ordinator for The Forum for Technology in Training, and a technology-based training consultant. He can be contacted at (tel) 0151 342 8606

If you have a multi-media or computer-based program you would like reviewed, please send a fully-functional version and screen-shot photograph to the editor.

ECDL 97 (European Computer Driving Licence)

Distributed by M2S, Business Design Centre, 52 Upper Street, Islington, London N1 0QH
Tel: 0171 288 6800
CD-ROM

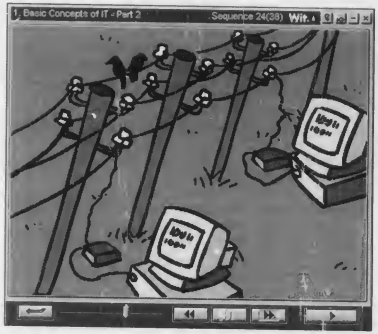
This course is designed to teach students the essential skills necessary to handle a PC. It prepares students for the ECDL examination, which has to be taken at one of the many centres throughout Europe. The topics covered on the CD-ROM are:

- the basic concepts of IT
- Windows 95/NT4
- Word 97
- Excel 97
- Access
- Excel DB 97
- PowerPoint 97, and
- Network Services.

While this computer-based training course has been geared to Office 97, it is available not only for different versions but also for Lotus Smartsuite. It uses text, sound, graphics and some animation, and offers the ability to have the course in a 'teacher window' while simultaneously allowing you to use other programs. This means you are being taught how to use the real system rather than a simulation, which consequently allows you to make mistakes and learn from them. So often, computer skills are taught using simulations that only allow users to follow the instructions they are given – even to the extent of not allowing them to spell incorrectly a word they are keying in.

A further advantage is that during your working day you can have the training program open as a teaching aid and reference tool when you can't remember how to carry out a particular function.

There is good instruction on how to navigate through the course, and help is always available via the study guide with each chapter. The navigation is fairly simple and intuitive. However, some explanation is given for switching between the 'teacher window' and live program on which you are working.



I am a Lotus person and only occasionally get involved in Microsoft products. I am self-taught in these systems; having had them loaded to the computer when I bought it, I do not have any manuals so resort occasionally to 'Help'. I learnt a great deal from this course – particularly the alternative methods of carrying out functions, some much easier than those I use.

The course has a specific purpose – that is, to teach the skills necessary to pass the ECDL … and it certainly achieves this. However, students do not necessarily need to complete the whole course. There is a pre-evaluation test which, when taken, sets up an individual curriculum based on the test results. This test and the post-evaluation use multi-choice questions and simulations to check your knowledge. Simulations are necessary here in order to check the answers. These tests are thorough and comprehensive.

ECDL 97

While you are going through the course you can take tests to check your understanding of the course material.

System requirements

You will require the following: PC 486/66 Mhz • 4 Mb RAM • VGA display • Windows 95 or 98/Windows NT • CD-ROM drive • 16-bit sound card

Cost

£184 per person; multiple copy discounts. **BT**

Ratings:			
Instructional design	★★★★	*User interface*	★★★
Interaction	★★★★	*Overall*	★★★★

Netcheck

As **Clare Forrest** was enjoying the recent fine weather and indulging in the odd 'senior moment' (that's dozing off to the uninformed), she was also putting together some notes on the home page of Coach U(niversity) Inc. which, according to itself, trains the finest coaches in the world.

As weeks go this hasn't been one of the best – both the fridge freezer and my favourite laptop decided to visit the great electrical graveyard in the sky. Apart from the unexpected expense this experience has, at least, taught me which modern appliance I can least live without. And it isn't the laptop. Still, thanks to the excellent back-up systems afforded via a Zip drive – regular readers will remember that I had my laptop stolen a couple of years ago and that the Windows back-up system didn't work, since when I've always used a Zip – I was able to get up and running again, computing-wise, very quickly. However – and there is a point to this rambling – I've had to use a fairly ancient web browser (Netscape 3) because my back-up machine hasn't got the resources to cope with the much more efficient Netscape Communicator. This has been a salutary experience. I have been very, very surprised at the number of sites that are, literally, virtually impossible to view without either 1E4/5 or Communicator. It seems to me that web designers – apparently one of the fastest moving professions in terms of salary growth – are forgetting that not everyone has, or wants, to upgrade their systems and will forego visiting a site rather than do so – which could be disastrous in terms of ecommerce. After all, it was only a month or so ago that CompuServe finally closed down its ASCII access. There's a lot of old browsers and old machines out there – and designers need to remember this.

The site I was finally able to access this month is one that will, I think, be familiar (at least in name), to many of you. It is www.coachu.com This is the home page of the Coach U(niversity) Inc. which is, apparently and according to itself, 'training the finest coaches in the world'.

This is a fascinating site… not so much for its content – there's nothing particularly special here – but for the way in which Sandy Vilas and Thomas J Leonard (who are the formative team for the CoachU) have taken to ecommerce like ducks to water. Leonard founded CoachU and sold out to Vilas in 1996. By the way, it is well worth checking out Leonard on his own site at www.thomasleonard.com

> If you're not sure what a coach does, then this **very informative site** will happily tell you

This man is not afraid of selling himself – his favourite word appears to be 'awesome'. However, since he has written on Internet marketing and seems to be extremely good at it, he's worth investigating. He also, incidentally, seems to have written as many books as Barbara Cartland and doesn't look a day over 45.

CoachU is, essentially, a certificated training programme for would-be personal and business coaches. This, apparently, is the newest profession and coaches, on payment of a fairly hefty fee, can register to take part in the training to gain them access to it. Now, of course, most of us are aware of the fad for coaching and many people who would once have called themselves training consultants or, depending on their bent, therapists, are now positioning themselves as coaches.

If you're not sure what a coach does, then this very informative site will happily tell you. According to Leonard: 'Coaches develop a personal partnership with their clients that is very different from the relationship people have with a therapist, consultant or even a friend … the client uses the coach to set goals, get a great life and make changes, and one of the reasons it works is that a coach helps a client stay in action. A coach is like a still small voice saying "Are you really doing what you want to do? What have you done this week to accomplish your goal?" It keeps them on track.'

Not much new there then. For those who might be thinking that this sounds just like another US fad, it is a rapidly growing business in the UK and, indeed, the rest of the industrialised world. But what is different is that CoachU coaches work virtually via phone and email, and train virtually using a mix of tapes, teleclasses (teleconferencing), workbooks, self-tests and phone mentoring. And it is this that makes the site so interesting for

UK-HRD

Join the UK-HRD Discussion Forum and network with more than a thousand trainers from the UK.

To join, simply add your email address to this card, fill out your name and address and return by post – no stamp is required. We will confirm your email address, add you to the forum and send you full details on how to post and receive messages. It costs nothing to join UK-HRD and you can leave and rejoin the forum at any time.

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Last name

Job title

Organisation

Address

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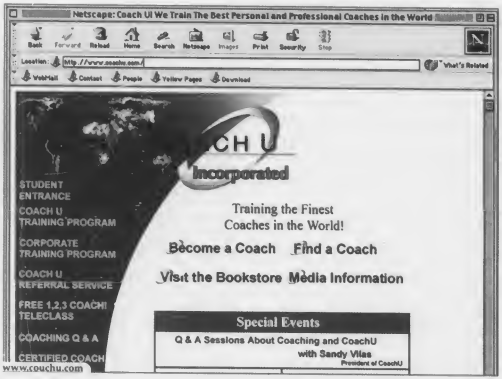
Clare Forrest would be pleased to know by snail-mail, email or carrier pigeon the URLs (web addresses) of any sites that you have enjoyed, loathed, or just find plain indispensable so that she can bring them to everyone's attention. She can be contacted at (e-mail) Cforrest@bigfoot.com



others who may be thinking of dabbling in ecommerce.

By offering its training virtually, CoachU has really tapped into this new market nationally and internationally. This isn't cheap – around US$3,500 – but it is very flexible. However, it's not so much the training itself I admire, since I can't vouch for the quality of this, but the marketing strategy. Everywhere you go on the site there are opportunities to purchase products, *and they are all produced by CoachU.* From tapes to t-shirts, it's all there. The book store, for example, offers

> It looks to me likely that, in the near future, if you've not got a CoachU certificate **you might not be taken seriously**

The Coaching Distinctionary (sic), which provides a collection of '225 subtleties of language which when gotten [sic again] quickly advance an individual along their path of development'. Presumably 'distinctionary' isn't one of the 225.

Leonard and Vilas have, very cleverly, created their product – a coaching qualification that they have designed – and made available with it via the website every conceivable piece of added value. There's a chat room, a coaches network, a search engine so you can find the right coach for you in your area, a press kit so coaches can quickly market themselves and so on. Plus there are many, many different and additional classes you can take – just like a real university – well, sort of. Remember, to be a coach you don't have to have a qualification. Anyone can do it. However, it looks to me likely that, in the near future, if you've not got a CoachU certificate you might not be taken seriously.

I was impressed by this site, simply because it shows great entrepreneurism and vision. It's not rocket science – what is, apart from rocket science itself? – but it is fascinating. Visited in conjunction with Leonard's own site it is a great learning experience for anyone who's serious about ecommerce and wants ideas and best practice. Oh yes, and I suspect would-be coaches might learn some useful things too. ***CF***

Ratings:	
Content	★★★★★
Originality	★★★★
Navigability	★★★★★
Links	★★
Presentation and graphics	★★★★
Downloads and freebies	★★★

Quick hits

www.dailygrammar.com
★★★
A wonderful, simple site where you can sign up and receive free grammar lessons via email. Although US-based the lessons are broad enough to be relevant for British use and a must-do for anyone who still thinks you can't start a sentence with 'And'.

www.oed.com/wordofday.htm
★★
Still on the subject of words, try this site run by the Oxford English Dictionary; here you get a new word every day along with its definitions and derivations. A great way of increasing your vocabulary and making sure you choose the right word. However, the site is very detailed so you might prefer to achieve much the same thing rather more painlessly by signing up at the following site.

www.cool-word.com
★★
Here you get a cool word emailed to you daily with its pronunciation and meaning. Cool Word is part of the learning kingdom site at www.learningkingdom.com/misc/company.html which has a range of interesting content including cool fact of the day and Quizzer, which coaches adults and children in geography, science, history and other subjects. Ostensibly for teenagers, adults will enjoy this site too.

The 'Oops!' factor

Do you wince when you encounter the 'Oops!' factor? **Anne Marples** does, which is why she offers common-sense advice for catching mistakes in CBT before it's too late.

The Owl and the Pussy-Cat
The Owl and the pussy-Cat went to sea
In a beautiful pea-green boat,
They took some honey, and plenty of money,
Wrapped up in a five pound-note.
The Owl looked up to the stars above,
and sang with a small guitar,
O lovely Pussy! O Pussy my love,
What a beautifull Pussy you are
You are!
What a beautiful Pussy you are!
With apologies to Edward Lear

If you noticed six or more of the deliberate mistakes in the verse above, you're reasonably wide awake. If you spotted all ten, you can congratulate yourself on being more observant than most. Catching mistakes in text is one thing; it's far harder when you're working through computer-based training packages. There's more to go wrong for a start, and screen-based material is intrinsically more demanding.

If you've ever purchased, or evaluated, a wide range of computer-based training (CBT), the chances are you've come across an error or glitch in some of them – something that should have been picked up by the producers before it was released. *So why wasn't it?* The reasons could include the following.

- In-house programmers didn't have the necessary skills.
- There wasn't time to do a thorough test before the release deadline.
- People who had worked on the product were too close to it to notice their own mistakes.
- Late design changes were not tested for consistency with, and impact on, earlier parts of the product.

These factors result in the dreaded 'Oops!' – and even an inconsequential mistake causes a lack of confidence in the product. To prove the point, try the following exercise for yourself. Imagine you're working through a CBT package and you spot things wrong with it. Mark the items below with a score from 1 to 5, where 5 indicates the highest level of irritation (or downright exasperation) you would feel towards the offending item.

- Spelling or grammatical errors in text…
- Text difficult to read on a graphical background…
- Lip-synch glitches, video sequences running jerkily…
- Questions that link to an incorrect answer page…
- Ambiguous question, where more than one answer could be correct…
- Factual errors…
- Hotspots or clickable areas not aligned correctly with graphic…

Table 1: Typical stages for testing a CBT

Aspect	Done by
1. Subject matter accuracy	Subject matter expert or high performer
2. Logic of scripting, linking and looping	Scriptor
3. Text accuracy of scripting	Copy editor
4. Screen design, graphics, hyperlinks, hotspots	Programmer
5. Alpha testing of first build	Programmer or project manager
6. Beta testing of second build	Representatives from target group

Having awarded your scores, answer the three questions below.

- How high would the total score need to reach before you rejected the product?
- Which of those errors have you ever seen in CBT?
- If things like this are unacceptable, why aren't they weeded out during testing?

Testing of a CBT product typically goes through six stages, as outlined in Table 1. Between steps 5 and 6, sections may be added, deleted, amended or modified. If so, steps 1–4 should be repeated to check out the impact of any change. If, at a late stage, the text is amended, this will usually be undertaken by a programmer, whose knowledge of the other areas may

Table 2: Skills required to detect the 'Oops!' factors

- Meticulous attention to detail.
- Excellent command of English.
- Understanding of human–computer interface issues.
- Understanding of screen design so as to optimise learning.
- Sufficient programming knowledge to describe and advise on technical issues.
- At least some understanding of the subject matter; familiarity with terms used.
- Good communication skills, especially the skill of giving constructive feedback.
- Sound knowledge of effective instructional design techniques.
- Thorough knowledge of Open Learning Design issues.
- Endless patience!

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The Owl looked up to the stars above,
and sang with a small guitar,
O loving Pussy! O Pussy my love,
What a beautifull Pussy you are
You are!
What a beautiful Pussy, you are!
With apologies to Edward Lear

If you noticed six or more of the deliberate mistakes in the verse above, you're reasonably wide awake. If you spotted all ten, you can congratulate yourself on being more observant than most. Catching mistakes in text is one thing; it's far harder when you're working through computer-based training packages. There's more to go wrong for a start, and screen-based material is intrinsically more demanding.

If you've ever purchased, or evaluated, a wide range of computer-based training (CBT), the chances are you've come across an error or glitch in some of them – something that should have been picked up by the producers before it was released. *So why wasn't it?* The reasons could include the following.

- In-house programmers didn't have the necessary skills.
- There wasn't time to do a thorough test before the release deadline.
- People who had worked on the product were too close to it to notice their own mistakes.
- Late design changes were not tested for consistency with, and impact on, earlier parts of the product.

These factors result in the dreaded 'Oops!' – and even an inconsequential mistake causes a lack of confidence in the product. To prove the point, try the following exercise for yourself. Imagine you're working through a CBT package and you spot things wrong with it. Mark the items below with a score from 1 to 5, where 5 indicates the highest level of irritation (or downright exasperation) you would feel towards the offending item.

- Spelling or grammatical errors in text…
- Text difficult to read on a graphical background…
- Lip-synch glitches, video sequences running jerkily…
- Questions that link to an incorrect answer page…
- Ambiguous question, where more than one answer could be correct…
- Factual errors…
- Hotspots or clickable areas not aligned correctly with graphic…

Table 1: Typical stages for testing a CBT

Aspect	Done by
1. Subject matter accuracy	Subject matter expert or high performer
2. Logic of scripting, linking and looping	Scriptor
3. Text accuracy of scripting	Copy editor
4. Screen design, graphics, hyperlinks, hotspots	Programmer
5. Alpha testing of first build	Programmer or project manager
6. Beta testing of second build	Representatives from target group

Having awarded your scores, answer the three questions below.

- How high would the total score need to reach before you rejected the product?
- Which of those errors have you ever seen in CBT?
- If things like this are unacceptable, why aren't they weeded out during testing?

Testing of a CBT product typically goes through six stages, as outlined in Table 1. Between steps 5 and 6, sections may be added, deleted, amended or modified. If so, steps 1–4 should be repeated to check out the impact of any change. If, at a late stage, the text is amended, this will usually be undertaken by a programmer, whose knowledge of the other areas may

Table 2: Skills required to detect the 'Oops!' factors

- Meticulous attention to detail.
- Excellent command of English.
- Understanding of human-computer interface issues.
- Understanding of screen design so as to optimise learning.
- Sufficient programming knowledge to describe and advise on technical issues.
- At least some understanding of the subject matter; familiarity with terms used.
- Good communication skills, especially the skill of giving constructive feedback.
- Sound knowledge of effective instructional design techniques.
- Thorough knowledge of Open Learning Design issues.
- Endless patience!

Anne Marples
is a freelance training materials designer. As a member of the Forum of Technology for Training, she specialised in Quality Assurance of CBT. She can be contacted at (email) amarples@cix.co.uk

not equal that of his or her own programming skills. It's a well recognised fact that you can't spot the errors in something produced by yourself – but they're glaringly obvious to someone else! The later in the development stage an error is identified, the more effort is needed to redeem the situation. From a cost point of view, errors picked up at beta testing stage are the least likely to be dealt with.

How likely is it that whoever does the alpha and beta testing of CBT would combine all the skills listed in Table 2? Drawing on a range of people at a company, you could hope to encompass most of them, but the more people you allocate to testing, the more expensive (or less profitable) it makes the product. Perhaps the testing of CBT should be a specialist role, performed by someone dedicated to the task, so they become highly skilled in the way that software systems testers are.

Returning to the verse that introduced this article, the publishing industry has evolved a method of tackling the issue in printed materials. Publishers use skilled copy-editors and proof-readers, who are often freelance and are listed in a directory that details their areas of specialism. By paying only for the actual hours worked, publishers are able to keep the costs reasonable; at the same time, the standard of expertise is assured by a recognised set of qualifications and professional membership. Maybe the CBT industry should develop a similar function as it matures. In the meantime, we live with the imperfections. ●

The (Perfect) Owl and the Pussy-Cat
The Owl and the Pussy-Cat went to sea
in a beautiful pea-green boat,
they took some honey, and plenty of money,
wrapped up in a five-pound note.
The Owl looked up to the stars above,
and sang to a small guitar,
'O lovely Pussy! O Pussy, my love,
What a beautiful Pussy you are,
You are!
What a beautiful Pussy you are!'

Edward Lear

UK-HRD is a free, email-based discussion forum administered by *Training Journal*. It has in excess of 1,000 active members and is the place to network with other trainers, share ideas and experiences, or seek advice on a wide range of training topics. For joining instructions, please refer to the back cover or visit www.ukhrd.com

Communication **disasters**

A note to **UK-HRD** has prompted a number of humorous responses.

Has anyone got any examples that illustrate how communication can be misinterpreted? I am particularly interested in telephone conversations, email messages and cultural differences.

Graham Wilson, Success Training & Development

This wasn't quite a disaster, but it did cause some angst to the writer (and is yet another reminder of how careful we should be when compiling emails).

Colleague A received a message from Colleague B saying: 'I resent your mail of Thursday.' Horror! What could A have said to upset B so much? Turned out that B had actually 're-sent' – that is, forwarded – the message in question to various other receivers.

Cecilia Bingham, WordSkills

Here are two genuine newspaper headlines that demonstrate how easy it is to convey the wrong message in so few words. 'College Head cooked for Queen'; and 'Home Office Minister to act on video nasties'.

Vic Cornelius, SE1 Macro Group

Here are some golden oldies from 'the language generically known as English' making its way around the world.

- Dry cleaner in Singapore: 'Drop your trousers here for best results.'
- Hotel in Paris: 'Please leave your values at the front desk.'
- Laundromat in Sweden: 'Leave your clothes here and have an enjoyable afternoon.'
- Newspaper advertisement in Brazil: 'Home wanted for large friendly dog. Will eat anything. Enjoys children.'
- Restaurant in Turkey: 'All water served in the restaurant is personally passed by the Manager.'

Sherwyn Singh, Grant Marketing & Consulting

Here's my two Euros' worth. The first, one of my favourites, may be apocryphal. The second is a personal one – definitely true!

1. Coca-Cola was launching its latest advertising onslaught under the 'Coca-Cola – Gives You Life!' (or some very similar) slogan. Much success was returned from this hugely expensive worldwide campaign, except in the Chinese market where sales were seen to take a decline. After much deliberation over the problem, one of the actual advertising posters was obtained and translated back into English. In the conversion from the original English to Chinese the slogan had become: 'Coca-Cola – brings your ancestors back from the dead'!

2. In a previous company (no names!) I was invited to join a communications 'quality improvement team'. At the inaugural meeting, myself and one other employee sat in a conference room for half an hour awaiting the other participants, who were blissfully unaware that their presence was required.

To this day I have kept the memo circulated later that day saying: 'Due to a breakdown in communications the Communications QIT meeting has been cancelled.'

Phil Ogden, OSRAM (UK) Ltd

I was told this in a factory where I once worked: they had commenced a quality improvement programme called 'Organising for Quality'. To promote it they printed a series of posters, using the Acronym 'O 4 Q'. The posters were withdrawn just in the nick of time…

George Edwards

Working in the voluntary sector a few years ago, I learned that it was protocol to refer in all correspondence to the outgoing president (elected by the membership for a four-year term) as Immediate Past President. Imagine my horror when I discovered the department administrator had sent out a letter in my absence to the Immediate Passed President! Fortunately the recipient had a fine sense of humour and a humble approach, and replied: 'I write to you from the other side…'!

Andrea Moffat

What's New...

New and recently released training resources.

• REVIEW

Setting Objectives and Seeing Them Through

Beverley Williams

Fenman (1999), Clive House, The Business Park, Ely, Cambs CB7 4EH. Tel: 01353 665533.
ISBN 1 872483 75 5
A4 ringbinder £195 plus carriage.

The trend for activity collections currently seems to be a concentration on a specific subject in each collection rather than the more general, wider application activities of yesteryear. This collection, by an experienced and skilled consultant and author, is no exception and in this case concentrates on the difficult subject of objectives. That is not to say objectives are difficult in themselves, but there is a widespread reluctance actually to produce effective objectives, in spite of the obvious benefit of working or training towards specific ends. Setting objectives is a common inclusion on training programmes and this collection of activities should go a long way towards encouraging learners to accept the need for this essential practice by having the learners commit themselves by doing rather than listening to a trainer expoundir.g the benefits.

The collection contains 16 activities, each following the pattern of what the activity is about, its purpose, approximate timing, materials needed, resources provided (handouts, OHP slide masters), an overview, and how to prepare and use it. The activities are self-standing for use in such programmes as personal development, management development, coaching and appraisal, but can also be grouped in family associations. Advice is given for this latter process, suggesting groupings for agreeing objectives with individuals in a team, agreeing team objectives, the objective-setting process and seeing objectives through to completion.

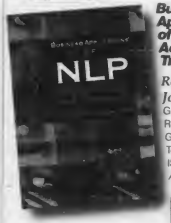
The activities and their resources are clearly written and laid out, and many are accompanied (as OHP slide masters) by humorous and relevant cartoons. The content is more than a simple 'here's an activity for you to use'; rather, it's a mini-session on the subject containing at least one, and frequently several, supporting activities. An example of this is, Activity 5 'Agreeing individual objectives', which suggests how to introduce the subject, followed by a group activity considering advantages and disadvantages plus an input on the stages of the objective-setting interview. The activity continues with a full group discussion on potential problems, role-plays of various types of objective-setting interviews and a final group summary discussion.

Ratings:

Clearly defined learning objectives	★★★★★
Variety and approach	★★★★★
Handouts and overheads	★★★★★
Trainer guidance	★★★★★
Universal practicality	★★★★★
Overall value	★★★★★

I thoroughly recommend this collection to any trainer who needs/wants/has to include material on this subject on their programmes. A welcome addition to the ever-growing tranche of activity collections. ***LR***

• REVIEW



Business Applications of NLP: 30 Activities for Training

Roy Johnson and John Eaton

Gower (1999), Croft Road, Aldershot GU11 3HR
Tel: 01252 331551
ISBN 0 566 08090 7
A4 ringbinder £155

In 1996, Gower published, as far as I know, the first UK collection of NLP activities, authored by Johnson (*40 Activities for Training with NLP*). Again, as far as I know, this current collection is only the second to be published.

The first collection included activities on goal-setting, self-management, reading people, rapport, communication channels, values and influence; an appendix suggests seven training courses including the activities. Also included were seven suggested NLP programmes.

This current collection's activities cover visionary leadership, influencing with word, business planning, working with groups, self and people management, unblocking people's potential, beginnings and endings. Ten suggested programmes are included – the subjects covering meetings and negotiation, entrancing communication, motivation, team building, creativity, personal influence, stress management, project management, personnel management and presentations – so extending the range of suggested training areas that can encompass NLP methods.

The activities themselves are creative and imaginative, albeit many of them are reminiscent of a number of activities I have previously encountered in different forms. I am sure NLP supporters will disagree,

REVIEW

'Learning à la carte' series: Managing Virtual Teams

Ash, Quarry Productions (1999)
Gower, Croft road, Aldershot GU11 3HR Tel 01252 331551 Website www.gowerpub.com
VHS video £120 plus VAT

This 16-minute VHS VT is one of the 'Learning à la carte' video series, which currently contains 12 titles. These videos are intended to cover 'really hot business topics' according to the press release but if this particular programme is a sample they fall very short of the mark.

I found the product far from exciting or new in its style or delivery. However, the interview and questions by Peter Quarry were undertaken in a soft, pleasing accent, which gave a calming note to the proceedings. The answers featured Ron Young, a chief executive with experience in the management of virtual teams.

The video explores the concept of virtual teams and the challenge facing organisations that have to manage disparate teams, on distant sites, in distant countries or indeed distant continents. However, it fails to deliver anything other than conventional wisdom and it gives answers that are stunningly obvious – which, it is said, is often the case when procuring advice from consultants. On social issues the video recognises that in virtual teams they are often not met and a balance is required.

The key learning points from the work are identified as focusing on managing outputs of work, how empowerment works in virtual teams, why knowledge workers tend not to make good managers, the art of distance coaching and managing cultural differences in virtual teams.

The closing section recognises the need for situational leadership, although I doubt if the reference is to P Hersey and K H Blanchard's specific work, which emphasises the maturity level of the followers in relation to a specific task.

The early emphasis and messages on empowerment, self-control, giving adequate information and keeping people aligned is lost in the delivery and blandness of the interview. Perhaps the greatest message from the video is that virtual teams do exist and they will need high levels of management skills to manage them effectively. ***SH***

Ratings:

Content and structure	★★
Support material (none given)	
Overall effectiveness	★

Steve Holman, Principal Lecturer at the University College of St Martin, can be contacted at (tel) 01524 384377

but with my examination of the activities, when the NLP-related comments and jargon are excluded offer activities that can be used in virtually any management training programme as straightforward training activities. This does not detract from the value and usefulness of the activities, but perhaps some of them are given an NLP tag to produce a 'revolutionary' difference. For example, the first activity entitled 'The team's vision' sets out to engage a team in creating a vivid picture of its desired future. The activity requires the team to cut out from newspapers and magazines pictures relating to: the goal – producing an advert; working together – producing a 'dig for victory' poster; participation – a cartoon; a collage – a built-up collage; reviewing – a photo of a soprano looking at herself in a mirror; and how to do it – a chain of arrows in a Business Links advert (and so on). Others require paired activities and discussions, small group-work and full team considerations.

In summary, I found this an interesting collection of activities usable in a wide range of programmes. Many of the methods require novel approaches to well-known topics and consequently offer a change of atmosphere from activities in the non-NLP manner that might be turning stale. ***LR***

Ratings:

Variety and approach	★★★★
Handouts and overheads	★★★★
Trainer guidance	★★★★
Universal practicality	★★★
Overall value	★★★★

REVIEW

The Call Centre Series

Distributed by Fenman
Clive House, The Business Park, Ely, Cambs CB7 4EH
Tel 01353 665533
Website: www.fenman.co.uk
Produced by OurBizness Productions (1999), Adelaide Australia
£395 each or £875 for four (exc. VAT plus p&p)

These four videos set out to improve the interactive skills of call centre operatives when dealing with customers by telephone. Each package employs a single case study illustrating a situation where a customer is calling in to a centre, or where an operative is calling out to a customer. A voice-over indicates where the operator failed to be effective and employs a 're-run' technique to show the 'correct' approach illustrated with textual learning points. The style is very effective, except for the learning points, where an uninspired layout makes the messages difficult to remember.

- 'The really angry customer' (13 minutes) examines the correct way to handle anger; it is well presented with good use of humour and a believable storyline.
- 'It's your call' (12 minutes) examines the customer making a purchase. Again, this was well sustained with some useful tips for 'selling on' and maintaining call rates.
- 'The outbound call' (13 minutes) deals with the operative making a 'soft' sale. This is not so well sustained and the points could have been made more quickly. However, it is still effective in its structure and concepts.
- 'Attitude is everything' (12 minutes) examines the operative's motivation to make a successful call. This was very effective except for the voice-overs, where a 'jokey' dialogue added little to the learning.

Each video is supported by a trainer's manual, which covers the learning and gives a suggested format for a four-hour workshop (supported with OHPs, a questionnaire, suggested exercises and feedback). This format could be very useful for the unskilled trainer, while there is enough material for the experienced practitioner to use in a wider context.

Overall this is a well-conceived package, carefully structured and professionally presented. It should appeal to trainees new to call centre activities. In addition, with the right positioning it could be used with more experienced operatives and any other staff making or receiving calls. As a bonus, the material will support the underpinning knowledge required for customer service and call centre NVQs. ***RB***

Ratings:

Content and structure	★★★
Support material	★★★
Overall effectiveness	★★★

Roger Brown of In Association, can be contacted at (tel) 01858 [illegible]

Andrew Mayo is a consultant, speaker, writer and facilitator in international HR management, with specialisms in people and organisation development. He can be contacted at (tel) 01727 843424 or (email) andrew@mltd.com

Balancing the scorecard

Are competency frameworks becoming too important? And can there ever be a meeting point between their idealism and a workplace reality? **Andrew Mayo** shares his views.

It would not surprise me if competency frameworks and their application were not the greatest single absorber of HR time and money in the last few years. It is at least 20 years since I was introduced to the 'development dimensions' of DDI and their application in the design of assessment centres. Since then the basic principle has been extended with the goal of providing a platform for all the processes that make comparisons between people and jobs, and also for personal development in its own right. Whole industries have been spawned – consultancies specialising in building the frameworks, using them in complex 360 degree feedback methods, building them into compensation systems, wholesale re-application for all the jobs in an organisation based on competency-targeted selection – and there is also a sophisticated journal of best practice called *Competency*. This movement has certainly created work for the HR profession, whether within or without an organisation.

So what has been achieved by all this effort? That depends how we judge it. In a recent study of the experience of members of the Learning Sharefair network, about one-third were very pleased with what they had created – albeit having learnt many lessons along the route. We can assess at the level of the process itself – the understanding of the framework, how well it is being used as intended, its face validity and relevance, the extent of applications based on it. At the other extreme, could we show an impact of our investment directly on the bottom line? That would be very difficult to do. In between, however, are some measures of success that are critical contributors to the bottom line, and if we are unable to show any change in them it is very questionable whether our framework has achieved anything for the business – other than perhaps providing a sense of fairness in people judgements.

These measures might include the following. A critical one is the quality of selection decisions. Some criteria for success or failure are necessary, such as the number judged to be successful by their management after one year, or the retention rate (if new recruits). Where the framework is used for personal development we would expect to see improved performance as a result of the development plans. If they are used for assessing potential, do we see the evidence of those who have been designated high potential progressing fast in the organisation? These factors are not always tracked, so we have no more than a gut feel for success at best and we might argue anyway that it's not the framework that's at fault but the way managers use it and their unwillingness to get trained fully.

That would be a worrying statement. Yet I have heard it many times. It tells me that managers have questions about its relevance or usefulness. And, frankly, I would not be surprised with many of the frameworks I have seen. They are often built on the premise that *behaviours* are the only determinants of high performance. Many of those behaviours are actually personality or intellectual characteristics, inherent in the individual, and there is a further assumption that they can all be developed. There is an assumption that people behave *consistently*, and yet mood, circumstances and the people surrounding a person can cause quite different behaviours. Additionally, there is an implied *universality* that we have described the unique mix which, if applied by an individual, will ensure a high level of performance and ability to progress. I have watched in amazement big international companies take their framework developed in the US or the UK and 'roll it out' around the world, as if there was any evidence at all that Japanese, Italian or Finnish managers achieve outstanding results through the same set of behaviours. Worst of all is the implication that men and women can also be standardised in this way.

A language that helps us systematically match people and posts – whether to assist selection, development or succession – seems an essentially beneficial tool. What is it, though, that constitutes *capability*? It must be more than personal behaviours and attitudes. Indeed, watch any experienced manager interview for a key post. Technical, professional and business skills will be probed, together with specialist knowledge and opinions on key subjects. Experience will be examined for breadth and depth, for problems and mistakes and successes. *Who* the person knows may be discussed – often an important contributor to performance. And at the end of the day, it may be that illusive chemistry that decides the situation.

A language that helps us systematically **match people and posts** seems an essentially beneficial tool

All of these components (bar the last) need to form part of a development plan, especially experience as the source of most learning. HR has an obsession with competencies, and training people aid and abet this with their own passion for personal development. Perhaps if more of them spent a period of time in the operational side of their organisation they would be better able to match their idealism with reality, and create their own 'balanced scorecard' of capability.

Share in our vision for lifelong learning

Second call for expressions of interest to become a qualified supplier of learning material to the University for Industry.

Expressions of interest are invited from organisations wishing to become qualified suppliers to the University for Industry (Ufi) for the provision of open and distance learning materials.

The Ufi is at the heart of the UK Government's vision for lifelong learning, and has two strategic objectives: to stimulate demand for lifelong learning, and to promote the availability of and access to high-quality, innovative learning, especially through the uses of information and communication technologies.

The Ufi will broker the provision of learning materials by:

- endorsing materials which meet its learning quality criteria;
- enhancing materials so that they meet those criteria, and then endorsing them;
- commissioning new materials where there is a lack of suitable provision.

The criteria for Ufi learning materials can be found on our website at www.ufiltd.co.uk.

All Ufi learning materials will be made available through networks of learning centres in England, Wales and Northern Ireland.

A qualified supplier model will be used for all categories of material.

There will be two categories of qualified supplier:

1. Companies, institutions, organisations or consortia which have, or are developing material which they wish to offer for endorsement;
2. Companies, institutions, organisations or consortia which are capable of undertaking the development of material commissioned to a Ufi specification.

The Ufi's current priority areas are: information and communication technologies; basic skills; small and medium enterprises; automotive components; multi-media; environmental technology and services; retail and distributive trades. However, we are also interested in hearing from potential suppliers of DODL materials, and/or the capacity to develop them, in any subject or employment areas.

Further details, including how to register an interest, the information which Ufi will require and the Ufi's criteria for endorsement, can be found on our website.

For queries which cannot be answered by the information there, please enquire via email to qsuppliers@ufi.cwc.com or by fax to 0114 224 3800.

The deadline for expressions of interest is 22 November 1999.

If you have already applied to become a qualified supplier and have been accepted, or are in the process of supplying further information, you need not apply again.

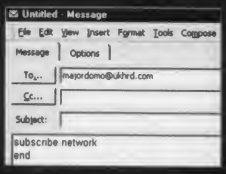
ufi

UK-HRD

The FREE email-based discussion forum dedicated to training and development.

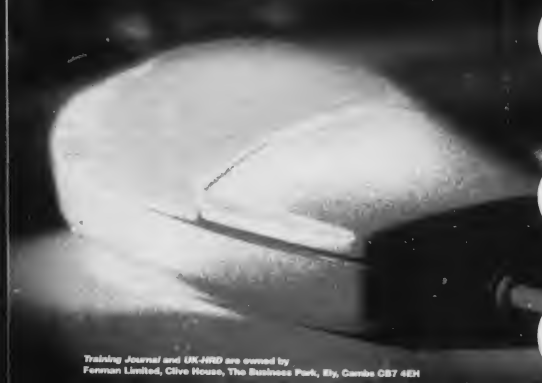
There are more than one thousand members in **UK-HRD** who communicate and network with each other by sending email messages via the forum. Individual messages are combined into one digest message, which is sent daily to each member.

Membership of the **UK-HRD** discussion forum is **totally free** and is open to anyone with an interest in training and development.



To join, simply send an email to **majordomo@ukhrd.com**. Leave the subject field blank. In the body of the message type the phrase 'subscribe network'. Your email message should look like this

Soon after you send your message you will receive notification and additional information on how to post messages to the forum. Remember, **UK-HRD is free** and you can join and leave the forum at any time.



'As a developing trainer, I find the network invaluable in keeping up-to-date with what's going on in the world of training. If I need advice, which I cannot get from anyone within my organisation, then I know that I can draw upon the pool of knowledge from the vast number of trainers/consultants on the HRD Network. I learn something new every day from the network – my development would be retarded without it – thank you!'
Jane Stovold, Technical Trainer

'I joined UK-HRD eight weeks ago. Since then the tips and help I have had have been tremendous. I wonder now how I managed without it.'
Kathy Cox, Human Resources Officer, Compugraphics International

'UK-HRD is a constant source of thought-provoking discussion, practical help, and contacts both friendly and professional. I've found something of value in almost every issue of the daily digest, and can't imagine life without it now!'
Cecilia Bingham, Word Skills

'There is a kind of openness and honesty amongst contributors, engendered perhaps by the 'levelling' effect of the e-mail medium. Our main areas of activity are: participating in general items of discussion with other trainers; offering advice and making a contribution to the profession; 'tips and tricks' that we can use and share; gaining an insight into the current topics and 'buzz' amongst members. So, to all at UK-HRD, keep up the good work!'
Ralph Nelson-Tucker and Helen Harding, Excel Communications Ltd.

'For me the value of UK-HRD is that it makes me think; that it shows there are many great alternative perspectives out there; and it is so easy to access.'
Roger Pattison, Roger Pattison & Associates

'I find UK-HRD particularly useful for the following reasons: To find out what is going on in the real world, not six to twelve months after the event. To broaden my understanding of the HRD world. To increase my network of contacts. To partake in professional debate. To do some real CPD.'
Mike Morrison, Management Development Advisor, Business Link London West

'I have been a subscriber of the UK-HRD forum for many months, and I consider it to be indispensable for keeping my finger on the pulse of training and development issues. Our services to clients are enhanced by the ongoing discussions, which are always stimulating and informative. Long may it continue.'
Bruce Hoag, Managing Director, Performance Advantage Ltd.

'I use UK-HRD almost daily. I find it is a great source of networking contacts, and have even met new customers through it. Its also amazing the different lights that you can get thrown on your 'problem' or issue – much more than 360 degree feedback!'

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